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# Chapter 1 – The Job to Be Done Now (PMI Alignment)

## Synopsis (PMBOK Lens)

Initiating Process Group:  
Hedda’s case study shows a failure to perform effective Identify Stakeholders and Develop Project Charter. Goals weren’t clearly defined, stakeholder alignment was missing, and success criteria weren’t measurable.  
  
Organizational Project Management (OPM):  
The book points out that in modern organizations, project work is the primary driver of change — aligning with PMI’s definition that projects are temporary endeavors undertaken to create a unique product, service, or result.  
  
Performance Domains:  
PMI’s Stakeholder, Planning, and Delivery performance domains are implicated when projects fail from unclear goals, lack of leadership support, or shifting scope.

## PMI-Linked Root Causes from the “Big Whammy” List

|  |  |
| --- | --- |
| Book’s Failure Point | PMBOK Equivalent Knowledge Area / Process |
| Unclear goals | Scope Management → Plan Scope Management, Collect Requirements |
| Weak leadership support | Stakeholder Management → Plan Stakeholder Engagement, Manage Stakeholder Engagement |
| Unrealistic timelines | Schedule Management → Define Activities, Estimate Activity Durations |
| Misaligned budget/resources | Cost & Resource Management → Estimate Costs, Acquire Resources |
| Shifting scope | Scope Management → Validate Scope, Control Scope |
| Poor planning | Integration Management → Develop Project Management Plan |
| Politics / invisible leadership | Stakeholder Management + Governance Framework |

## PMI Principles Reinforced

- Stewardship: Hedda’s failure case reflects weak stewardship of both resources and stakeholder trust.  
- Stakeholder Engagement: Aligning project purpose with stakeholder needs prevents many of the listed failure modes.  
- Value Delivery: Projects should deliver measurable value; without a clear value statement (benefits management plan), success is unlikely.

## PMI-Aware Talking Points for Class

1. “This chapter is really a cautionary tale about failing to execute the Initiating process group properly — no stakeholder alignment, no clear charter, and no defined success criteria.”  
2. “The Big Whammy failure statistics track directly to gaps in Scope, Schedule, and Stakeholder Management — which is exactly why PMI treats these as core knowledge areas.”  
3. “PMI’s benefits management plan could have prevented the value-loss scenario Hedda was in — the book frames it as principle-based, PMI frames it as a formal deliverable.”

## PMI-Style Discussion Question

If over 60% of projects fail due to unclear goals or shifting scope, should the PM’s primary focus in the first 10% of the project be Scope Management or Stakeholder Engagement — and why?

**Chapter 2 – Principles of Project Success (PMI Alignment)**

**Synopsis (PMBOK Lens)**

The chapter introduces the core success equation: People + Process = Success. It stresses that both competent execution and strong interpersonal leadership are essential to delivering value. The authors present 'Four Foundational Behaviors' that build informal authority and enable effective leadership in any project environment.

**Four Foundational Behaviors – PMI Alignment**

|  |  |
| --- | --- |
| FranklinCovey Behavior | PMBOK Equivalent Principle / Domain |
| Demonstrate Respect | Stakeholder Engagement – Build trust and maintain professional relationships |
| Listen First | Communication Management – Active listening and understanding before response |
| Clarify Expectations | Scope Management – Define and validate deliverables, set acceptance criteria |
| Practice Accountability | Stewardship and Team Performance – Monitor commitments and own outcomes |

**PMI Principles Reinforced**

- Stewardship: Taking responsibility for results and resources.  
- Stakeholder Engagement: Actively managing relationships to support project outcomes.  
- Team Performance: Creating conditions where the team can perform at its best.  
- Value Delivery: Ensuring the project delivers measurable benefits in line with the business case.

**PMI-Aware Talking Points for Class**

1. “The People + Process equation maps neatly to PMBOK’s Performance Domains — neglect either, and you compromise the delivery of value.”  
2. “These four behaviors are essentially PMI’s stakeholder and team performance principles in plain language.”  
3. “Clarifying expectations early prevents scope creep — a Scope Management best practice PMI explicitly measures.”

**PMI-Style Discussion Question**

If People + Process = Success, and you had to prioritize one in a project’s first month, which would you choose and how would you justify it using PMBOK principles?

# Chapter 3 – Scoping the Project (PMI Alignment)

## Synopsis (PMBOK Lens)

This chapter focuses on defining the project’s boundaries, deliverables, and success criteria. It emphasizes the importance of aligning scope with stakeholder expectations and organizational objectives. The FranklinCovey approach encourages involving the right stakeholders early and documenting scope in a clear, accessible way. From a PMBOK perspective, this maps directly to the Scope Management knowledge area within the Planning process group.

## Key Practices – PMI Alignment

|  |  |
| --- | --- |
| Book's Practice | PMBOK Equivalent Process / Artifact |
| Define project boundaries clearly | Plan Scope Management – Define what is in and out of scope |
| Identify and engage stakeholders early | Identify Stakeholders – Determine needs, influence, and engagement approach |
| Document deliverables in plain language | Collect Requirements – Translate needs into measurable deliverables |
| Gain agreement on success criteria | Define Scope – Create a project scope statement with acceptance criteria |
| Validate scope with stakeholders | Validate Scope – Formal acceptance of deliverables throughout the project |

## PMI Principles Reinforced

- Stakeholder Engagement: Bringing stakeholders into scoping discussions ensures alignment.  
- Value Delivery: Scope should be directly tied to delivering the benefits defined in the business case.  
- Systems Thinking: Understanding how scope interacts with time, cost, and quality constraints.

## PMI-Aware Talking Points for Class

1. “Scoping isn’t just a Planning process — PMI treats it as a living agreement that needs ongoing validation.”  
2. “Unclear scope is the fastest route to change requests and rework — this is why PMBOK formalizes scope statements.”  
3. “Early stakeholder engagement in scoping aligns perfectly with PMI’s performance domains for both Stakeholder and Planning.”

## PMI-Style Discussion Question

What is the single most critical input to the project scope statement, and how does securing it early reduce the risk of scope creep?

# Chapter 4 – Planning the Project (PMI Alignment)

## Synopsis (PMBOK Lens)

This chapter focuses on creating a realistic, actionable plan that aligns scope, schedule, cost, and resources. The FranklinCovey perspective simplifies planning into clear, collaborative steps, while PMI formalizes it through multiple planning processes across all knowledge areas. The key is integrating all subsidiary plans into a cohesive Project Management Plan.

## Key Practices – PMI Alignment

|  |  |
| --- | --- |
| Book's Practice | PMBOK Equivalent Process / Artifact |
| Break work into manageable parts | Create WBS – Decompose deliverables into work packages |
| Sequence activities logically | Sequence Activities – Determine activity order and dependencies |
| Estimate time and resources collaboratively | Estimate Activity Durations & Estimate Activity Resources |
| Identify risks early | Identify Risks – Document potential threats and opportunities |
| Integrate all elements into one plan | Develop Project Management Plan – Consolidate subsidiary plans into one baseline |

## PMI Principles Reinforced

- Systems Thinking: Understanding how schedule, cost, and resource plans interact.  
- Tailoring: Adapting planning processes to project size and complexity.  
- Risk Management: Embedding risk identification and response strategies into the plan.  
- Collaboration: Co-creating plans with the team and stakeholders to improve buy-in and accuracy.

## PMI-Aware Talking Points for Class

1. “The book’s emphasis on collaborative planning maps directly to PMI’s principle of stakeholder engagement.”  
2. “Breaking work into a WBS isn’t just for large projects — it’s a PMI best practice that applies universally.”  
3. “Early risk identification during planning allows for schedule and cost reserves, which aligns with PMI’s risk response planning.”

## PMI-Style Discussion Question

If you had to prioritize one element of the planning process — schedule, cost, scope, or risk — which would you choose first, and how would that choice affect the rest of the plan?

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## PMI-Style Discussion Question

If you had to prioritize one element of the planning process — schedule, cost, scope, or risk — which would you choose first, and how would that choice affect the rest of the plan?

# Chapter 6 – Track & Adapt (PMI Alignment)

## Synopsis (PMBOK Lens)

This chapter focuses on monitoring project performance, identifying variances, and making necessary adjustments to keep the project aligned with objectives. FranklinCovey frames this as a proactive, continuous process of checking progress and adapting as needed. PMI formalizes it through the Monitoring and Controlling process group, particularly within Integration, Scope, Schedule, Cost, Quality, and Risk Management.

## Key Practices – PMI Alignment

|  |  |
| --- | --- |
| Book's Practice | PMBOK Equivalent Process / Artifact |
| Regularly review progress against plan | Monitor and Control Project Work – Compare actual vs. planned performance |
| Identify and address variances early | Perform Integrated Change Control – Assess and manage change requests |
| Use data to inform adjustments | Control Quality / Control Scope / Control Schedule – Apply metrics to guide decisions |
| Engage stakeholders in course corrections | Manage Stakeholder Engagement – Keep stakeholders informed and involved |
| Celebrate milestones and wins | Manage Team – Recognize contributions to maintain morale |

## PMI Principles Reinforced

- Value Delivery: Ensuring ongoing alignment of work with intended benefits.  
- Systems Thinking: Understanding ripple effects of changes across scope, schedule, and cost.  
- Adaptability and Resilience: Responding quickly and effectively to changes.  
- Continuous Improvement: Using performance data to refine processes.

## PMI-Aware Talking Points for Class

1. “The chapter’s concept of Track & Adapt is essentially PMI’s Monitoring and Controlling process group in action.”  
2. “Early variance detection is critical — PMI’s Earned Value Management provides one quantitative method to support this.”  
3. “Engaging stakeholders in mid-course corrections helps maintain alignment and avoids late-stage surprises.”

## PMI-Style Discussion Question

What’s the most effective way to decide whether a variance warrants a formal change request, and how does PMI’s Integrated Change Control process guide that decision?

**Chapter 7 – Close (PMI Alignment)**

**Synopsis (PMBOK Lens)**

This chapter focuses on formally closing the project or phase, ensuring all deliverables are accepted, lessons are documented, and resources are released. FranklinCovey emphasizes celebrating achievements and capturing insights for future work. PMI formalizes this in the Closing process group, particularly the process of Close Project or Phase within Integration Management.

**Key Practices – PMI Alignment**

|  |  |
| --- | --- |
| Book's Practice | PMBOK Equivalent Process / Artifact |
| Obtain formal acceptance of deliverables | Validate Scope – Gain formal sign-off from stakeholders |
| Document lessons learned | Manage Project Knowledge – Update lessons learned register |
| Release project resources | Close Project or Phase – Release team and reallocate resources |
| Celebrate team achievements | Manage Team – Recognize performance and contributions |
| Archive project documents | Close Project or Phase – Ensure complete records for compliance and reference |

**PMI Principles Reinforced**

- Stewardship: Closing responsibly by ensuring all obligations are met.  
- Knowledge Transfer: Capturing lessons for organizational learning.  
- Team Performance: Ending on a positive note to strengthen future collaboration.  
- Value Delivery: Verifying that the intended benefits have been realized.

**PMI-Aware Talking Points for Class**

1. “Closing is more than paperwork — it’s about ensuring benefits realization and capturing organizational learning.”  
2. “Lessons learned should feed directly into future planning processes, supporting PMI’s continuous improvement mindset.”  
3. “Formal acceptance protects the project manager from scope-related disputes after project completion.”

**PMI-Style Discussion Question**

How can project managers ensure that lessons learned are actually applied in future projects, rather than just documented and archived?

# Conclusion – Applying Principles Across All Projects (PMI Alignment)

## Synopsis (PMBOK Lens)

The conclusion reinforces that successful project outcomes are driven by a consistent focus on value delivery, stakeholder engagement, and disciplined application of core principles. FranklinCovey encourages all project leaders, regardless of title, to integrate both people skills and process discipline into every project. From a PMI standpoint, this reflects the integration of all performance domains and tailoring them to the unique context of each project.

## Key Takeaways – PMI Alignment

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| --- | --- |
| FranklinCovey Emphasis | PMBOK Equivalent Principle / Domain |
| Balance people and process for success | All Performance Domains – Integration of technical and interpersonal skills |
| Tailor your approach to the project | Tailoring – Adjusting methods based on project size, complexity, and context |
| Focus on value from start to finish | Value Delivery System – Ensure benefits realization across the project life cycle |
| Engage stakeholders continuously | Stakeholder Performance Domain – Ongoing engagement for alignment and support |
| Apply lessons learned to future work | Knowledge Management – Continuous improvement through organizational learning |

## PMI Principles Reinforced

- Value Delivery: The project exists to deliver measurable benefits.  
- Tailoring: No one-size-fits-all — approaches must be adapted.  
- Stewardship: Responsible management of resources and relationships.  
- Continuous Learning: Embedding knowledge into organizational practices.

## PMI-Aware Talking Points for Class

1. “The conclusion ties directly to PMI’s idea that value delivery is the core driver of all projects.”  
2. “Tailoring is not about ignoring standards — it’s about applying them appropriately to the situation.”  
3. “Closing the loop with lessons learned ensures each project improves the organization’s future capability.”

## PMI-Style Discussion Question

If you could improve only one PMI performance domain across your organization, which would yield the greatest increase in overall project success and why?