



SPM PM Process Groups

Day 3: PM Process Groups

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Last Class We Discussed

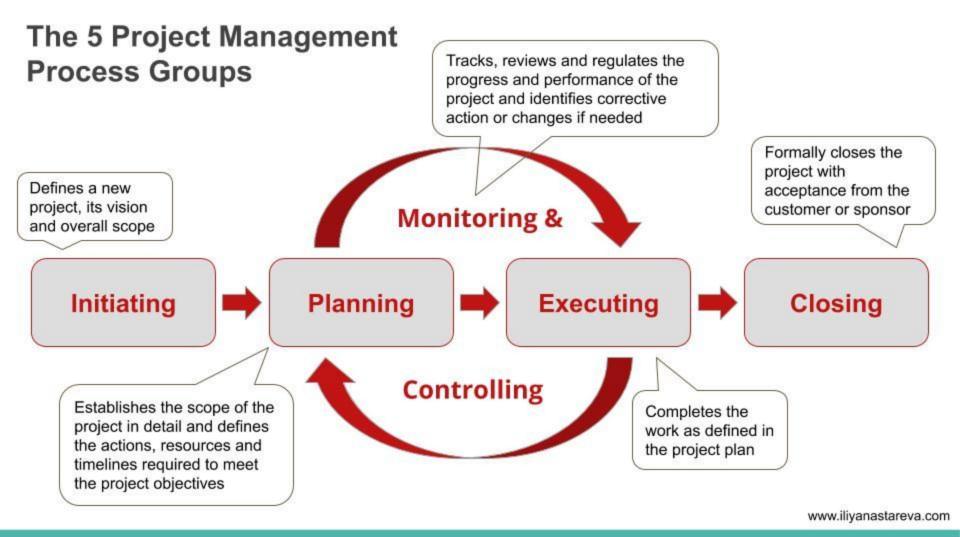
- Systems View of Project Management
- Three Sphere Model for Systems Management
- 4 Frames of Organization Perspectives on Organization
- Organizational Culture & its 10 Characteristics
- Significance of Stakeholder Management
- Project Phases
- SDLC(Systems Development Life Cycle) Predictive Vs Adaptive Life Cycle
- Waterfall and Sprial Life Cycle Models
- SCRUM Framework
- KANBAN Framework

Today's Learning Objectives

- The 5 Process Groups in Project Management
- Process Groups Interrelation to PM Knowledge Areas
- Process Groups: Case Studies
- Process Group Approach Vs Agile Approach (Based on JWD Case Study)
- Creating Document Templates for each process group
- WBS (Work Breakdown Structure)
- SCRUM (Systematic Customer Resolution Unravelling Meeting) in Detail

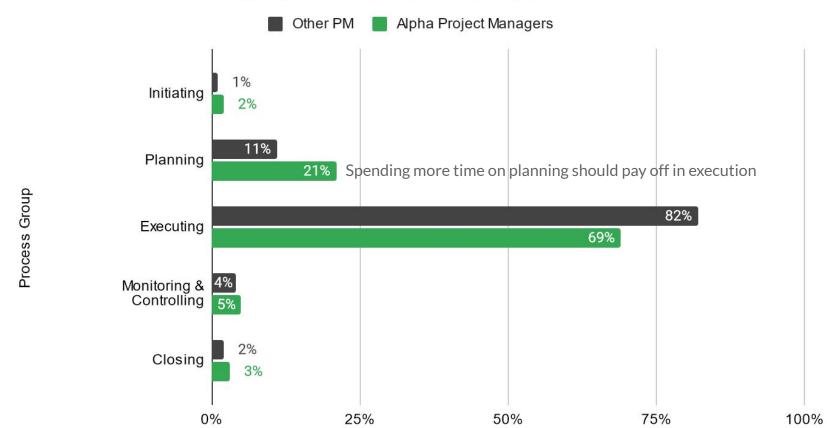
PM Process Groups

- A "process" is a series of actions directed towards a particular result
- → Project Management is quite literally a series of interlinked processes
- → PM Process Groups comprises of following five processes:
 - 1. Initiating Processes
 - 2. Planning Processes
 - 3. Executing Processes
 - 4. Monitoring and Controlling Processes
 - 5. Closing Processes



PERCENTAGE OF TIME SPENT ON EACH PROCESS GROUP

Source: Information Technology Eighth Edition, Andy Crowe, Copyright 2016



Case Study - What Went Wrong?

<u>2014 U.S. Government Accountability Office (GAO) report on IRS (Internal Revenue Office)</u>

Philip A. Pell, PMP, commented on how the U.S. IRS needed to improve its project management process. "Pure and simple, good, methodology centric, predictable and repeatable project management is the SINGLE greatest factor in the success or failure of any project. The project manager is ultimately responsible for the success or failure of the project."

The report stated that IRS had significant cost and schedule variances in over 68% of its major IT projects.

Comment made by Philip was posted on CIO Magazine Website on an article titled "For the IRS, there is no easy fix"

A quick glance correlating PM Process Groups in IT with Other Project Types

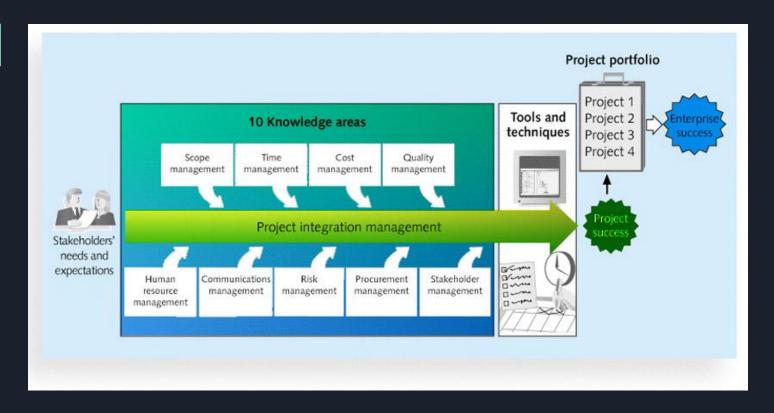
"Just as information technology projects need to follow the project management process groups so do other projects such as production of a movie. To compare and contrast a movie making process might include

Screenwriting (Initiating), Producing (Planning), Acting and Directing (Executing), Editing (Monitoring and Controlling) and finally Releasing the Movie in Theaters (Closing).

Many people enjoy watching the extra features on a DVD that describes how these processes lead to the creation of a movie. This acted <u>not as a promotional filler</u> but as a serious and meticulously <u>detailed examination of the entire film making process</u>. Project Managers in any field know <u>how important it is to follow a good process</u>."

Jacks, Brian, "Lord of the Rings: The Two Towers Extended Edition", ugo.com Aug, 2004.

Project Management Framework - 10 Knowledge Areas of PM



PMBOK® 6th Edition

10 Knowledge Areas

- 1. Integration Management
- 2. Scope Management
- 3. Schedule Management
- 4. Cost Management
- 5. Quality Management
- 6. Resources Management
- 7. Communications Management
- 8. Risk Management
- 9. Procurement Management
- 10. Stakeholder Management

PMBOK® 7th Edition

8 Performance Domains

- Stakeholders
- 2. Team
- Development Approach and Life Cycle
- 4. Planning
- Project Work
- 6. Delivery
- 7. Measurement
- 8. Uncertainty

Comparison of 6th and 7th Editions of the PMBOK[®] Guide 8 Performance Domains replace the 10 Knowledge Areas



PMBOK Guide 6th and 7th Editions

PMBOK Guide 2021 Update

	PMBOK 6 th Edition	PMBOK 7 th Edition	
01	Focus on process	Focus on value based delivery	01
02	10 Knowledge areas	8 Performance domains	
	Emphasis on phases of project management	Emphasis on project delivery principles	02
03	Follows traditional methodology of PM	Introduction to various PM approaches	03
04	Well understood by	Understood by anyone directly involved with	04
05	project managers	project	05

Mapping Process Groups to Knowledge Areas

We can map the main activities of each PM process group into the 10 knowledge areas using the PMBOK Guide, Fifth Edition, 2013. PMBOK Guide, Sixth Edition, 2017 has made few updates to the mapping.

Activities from each knowledge area are present under the planning process groups

LINK:

https://www.deepfriedbrainproject.com/assets/files/pmbok-guide-6th-edition-process-group-knowledge-area.pdf

Developing IT PM Methodologies

Approaches to Project Management are also unique just like projects and it is common for organizations to develop their own methodologies specially for IT projects.

Methodology basically means "how things should or will be done" contrasting to Organization Standard which means "what should be done"

Some Methodologies that we will explore in this curriculum are:

- PRINCE2
- Agile
- Rational Unified Process (RUP)
- Six Sigma

Outlook on Global Issue

A 2011 Study of organizations across India included the following findings:

- → ¾ of organizations adopting Agile methodologies are gaining benefits in terms of faster product delivery, improved ability to manage changing requirements, higher quality and productivity.
- However, organizations struggle with magnitude of cultural shift required for Agile, opposition to change, lack of coaching in order to adapt to agile and a lack of qualified people
- Daily standup, Iteration planning, Release planning are most commonly used practices in agile while paired programming and open workspaces are not so popular.

Case Study: JWD Consulting's PM Intranet Site (Predictive Approach)

PROJECT PRE-INITIATION

Senior Managers perform following tasks in this stage:

Determine triple constraints, Identify project sponsor, Select Project Manager, Develop Business Case, Meet with PM for process/expectation review, Determine if project should be divided into two or more smaller projects for better management.

PROJECT INITIATION

- Initiating a project includes recognizing and starting a new project or project phase
- Main goal is to formally select and start off projects

Project Initiation

Following information was included in pre-initiation in this business case:

- Introduction/background
- Business Objective
- Current Situation and problem/opportunity statement
- Critical assumptions and constraints
- Analysis of options and recommendation
- Preliminary project requirements
- Budget estimate and financial analysis
- Schedule estimate
- Potential risks
- Exhibits

Table below shows project initiation knowledge areas, processes and output

Knowledge Area	Initiating Process	Outputs
Project Integration Management	Develop project charter	Project charter
Project Stakeholder Management	Identify stakeholders	Stakeholder register

Stakeholder Register

Name	Position	Internal/ External	Project Role	Contact Information
Joe Fleming	CEO	Internal	Sponsor	joe_fleming@jwdconsulting.com
Erica Bell	PMO Director	Internal	Project manager	erica_bell@jwdconsulting.com
Michael Chen	Team member	Internal	Team member	michael_chen@jwdconsulting.com
Kim Phuong	Business analyst	External	Advisor	kim_phuong@client1.com
Louise Mills	PR Director	Internal	Advisor	louise_mills@jwdconsulting.com

Stakeholder Management Strategy

Stakeholder Management Strategy Documents often contain sensitive information as shown below and should therefore not be published.

Name	Level of Interest	Level of Influence	Potential Management Strategies
Joe Fleming	High	High	Joe likes to stay on top of key projects and make money. Have a lot of short, face-to- face meetings and focus on achieving the financial benefits of the project.
Louise Mills	Low	High	Louise has a lot of things on her plate, and she does not seem excited about this project. She may be looking at other job opportunities. Show her how this project will help the company and her resume.

Project Charter & Kick Off Meetings

Charters are short and include key project information and stakeholder signatures

It is a very good practice to hold a Kick-off meeting at the beginning of a project so that stakeholders can meet each other, review the goals of the project and discuss future plans.

Samples of Project Charter & Kick-off Meeting from this case study presented in the next slides...

Project Objectives: Develop a new capability accessible on JWD Consulting's intranet site to help internal consultants and external customers manage projects more effectively. The intranet site will include several templates and tools that users can download, examples of completed templates and related project management documents used on real projects, important articles related to recent project management topics, an article retrieval service, links to other sites with useful information, and an "Ask the Expert" feature, where users can post questions about their projects and receive advice from experts in the field. Some parts of the intranet site will be accessible free to the public, other parts will only be accessible to current customers and internal consultants, and other parts will be accessible for a fee. Main Project Success Criteria: The project should pay for itself within one year of completion. Approach: Develop a survey to determine critical features of the new intranet site and solicit input from consultants and customers. Review internal and external templates and examples of project management documents. Research software to provide security, manage user inputs, and facilitate the article retrieval

revenues, both during the project and one year after project completion.

Develop the intranet site using an iterative approach, soliciting a great deal of user feedback. Determine a way to measure the value of the intranet site in terms of reduced costs and new

Budget Information: The firm has allocated \$140,000 for this project. The majority of costs for this

project will be internal labor. An initial estimate provides a total of 80 hours per week.

Project Manager: Erica Bell, (310) 555-5896, erica_bell@jwdconsulting.com

Projected Finish Date: November 4

Project Title: Project Management Intranet Site Project

and "Ask the Expert" features.

Project Start Date: May 2

ROLES AND RESPONSIBILITIES				
Name	Role	Position	Contact Information	
Joe Fleming	Sponsor	JWD Consulting, CEO	joe_fleming@jwdconsulting.com	
Erica Bell	Project Manager	JWD Consulting, manager	erica_bell@jwdconsulting.com	
Michael Chen	Team Member	JWD Consulting, senior consultant	michael_chen@jwdconsulting.com	
Jessie Faue	Team Member	JWD Consulting, consultant	jessie_faue@jwdconsulting.com	
Kevin Dodge	Team Member	JWD Consulting, IT department	kevin_dodge@jwdconsulting.com	
Cindy Dawson	Team Member	JWD Consulting, IT department	cindy_dawson@jwdconsulting.com	
Kim Phuong	Advisor	Client representative	kim_phuong@client1.com	
Page Miller	Advisor	Client representative	page_miller@client2.com	
Sign-Off: (Signatures of all the above stakeholders)				
Comments: (Handwritten or typed comments from above stakeholders, if applicable)				
"I will support this project as time allows, but I believe my client projects take priority. I will have one of my assistants support the project as needed."—Michael Chen				
	to parts of the i		m, especially the security in ic and clients."—Kevin Dodge	

Kick-Off Meeting [Date of Meeting]

Project Name: Project Management Intranet Site Project

Meeting Objective: Get the project off to an effective start by introducing key stakeholders, reviewing project goals, and discussing future plans

Agenda:

- Introductions of attendees
- Review of the project background
- Review of project-related documents (i.e., business case, project charter)
- Discussion of project organizational structure
- Discussion of project scope, time, and cost goals
- Discussion of other important topics
- List of action items from meeting

Action Item	Assigned To	Due Date

Date and time of next meeting:

Project Planning

Main purpose of project planning is to guide project execution.

Key Outputs included in the JWD project includes:

- A team contract
- A project scope statement
- A Work Breakdown Structure (WBS)
- A project schedule in form of Gantt Chart with dependencies and resources entered
- A list of prioritized risks (part of a risk register)

Detailed planning processes and outputs presented in next slides...

	Knowledge Area	Planning Process	Outputs
	Project Integration Management	Develop project management plan	Project management plan
	Project Scope Management	Plan scope management	Scope management plan Requirements management plan
		Collect requirements	Requirements documentation Requirements traceability matrix
		Define scope	Project scope statement Project documents updates
		Create WBS	Scope baseline Project documents updates
	Project Time Management	Plan schedule management	Schedule management plan
		Define activities	Activity list Activity attributes Milestone list Project management plan updates
		Sequence activities	Project schedule network diagrams Project documents updates

		Estimate activity resources	Activity resource requirements Resource breakdown structure Project documents updates
		Estimate activity durations	Activity duration estimates Project documents updates
		Develop schedule	Schedule baseline Project schedule Schedule data Project calendars Project management plan updates Project documents updates
	Project Cost Management	Plan cost management	Cost management plan
		Estimate costs	Activity cost estimates Basis of estimates Project documents updates
		Determine budget	Cost baseline Project funding requirements Project documents updates

Knowledge Area	Planning Process	Outputs
Project Quality Management	Plan quality management	Quality management plan Process improvement plan Quality metrics Quality checklists Project documents updates
Project Human Resource Management	Plan human resource management	Human resource plan
Project Communications Management	Plan communications management	Communications management plan Project documents updates
Project Risk Management	Plan risk management	Risk management plan
	Identify risks	Risk register
	Perform qualitative risk analysis	Project documents updates
	Perform quantitative risk analysis	Project documents updates
	Plan risk responses	Project management plan updates Project documents updates

Project Procurement Management	Plan procurement management	Procurement management plan Procurement statement of work Procurement documents Source selection criteria Make-or-buy decisions Change requests
Project Stakeholder Management	Plan stakeholder management	Stakeholder management plan Project documents updates

Team Contract

Code of Conduct: As a project team, we will:

- Work proactively, anticipating potential problems and working to prevent them.
- Keep other team members informed of information related to the project.
- Focus on what is best for the entire project team.

Participation: We will:

- Be honest and open during all project activities.
- · Encourage diversity in team work.
- Provide the opportunity for equal participation.
- Be open to new approaches and consider new ideas.
- · Have one discussion at a time.
- Let the project manager know well in advance if a team member has to miss a meeting
 or may have trouble meeting a deadline for a given task.

Communication: We will:

- Decide as a team on the best way to communicate. Because a few team members cannot
 often meet face to face, we will use e-mail, a project Web site, and other technology to
 assist in communicating.
- Have the project manager facilitate all meetings and arrange for phone and video conferences, as needed.
- Work together to create the project schedule and enter actuals into the enterprise-wide project management system by 4 p.m. every Friday.
- Present ideas clearly and concisely.
- Keep discussions on track.

Problem Solving: We will:

- Encourage everyone to participate in solving problems.
- · Only use constructive criticism and focus on solving problems, not blaming people.
- Strive to build on each other's ideas.

Meeting Guidelines: We will:

- Plan to have a face-to-face meeting the first and third Tuesday morning of every month.
- Meet more frequently the first month.
- Arrange for telephone or videoconferencing for participants as needed.
- Hold other meetings as needed.
- Record meeting minutes and send them via e-mail within 24 hours of all project meetings, focusing on decisions made and action items from each meeting.

Draft Version of Scope Statement

Project Title: Project Management Intranet Site Project

Date: May 18 Prepared by: Erica Bell, Project Manager, erica_bell@jwdconsulting.com

Project Summary and Justification: Joe Fleming, CEO of JWD Consulting, requested this project to assist the company in meeting its strategic goals. The new intranet site will increase visibility of the company's expertise to current and potential clients. It will also help reduce internal costs and improve profitability by providing standard tools, techniques, templates, and project management knowledge to all internal consultants. The budget for the project is \$140,000. An additional \$40,000 per year will be required for operational expenses after the project is completed. Estimated benefits are \$200,000 each year. It is important to focus on the system paying for itself within one year of its completion.

Product Characteristics and Requirements:

- 1. Templates and tools: The intranet site will allow authorized users to download files they can use to create project management documents and to help them use project management tools. These files will be in Microsoft Word, Excel, Access, Project, or in HTML or PDF format, as appropriate.
- User submissions: Users will be encouraged to e-mail files with sample templates and tools to the Webmaster. The Webmaster will forward the files to the appropriate person for review and then post the files to the intranet site, if desired.
- 3. Articles: Articles posted on the intranet site will have appropriate copyright permission. The preferred format for articles will be PDF. The project manager may approve other formats.
- 4. Requests for articles: The intranet site will include a section for users to ask someone from the Project Management Office (PMO) at JWD Consulting to research appropriate articles for them. The PMO manager must first approve the request and negotiate payments, if appropriate.
- Links: All links to external sites will be tested on a weekly basis. Broken links will be fixed or removed within five working days of discovery.

- 6. The "Ask the Expert" feature must be user-friendly and capable of soliciting questions and immediately acknowledging that the question has been received in the proper format. The feature must also be capable of forwarding the question to the appropriate expert (as maintained in the system's expert database) and capable of providing the status of questions that are answered. The system must also allow for payment for advice, if appropriate.
- 7. Security: The intranet site must provide several levels of security. All internal employees will have access to the entire intranet site when they enter their security information to access the main, corporate intranet. Part of the intranet will be available to the public from the corporate Web site. Other portions of the intranet will be available to current clients based on verification with the current client database. Other portions of the intranet will be available after negotiating a fee or entering a fixed payment using pre-authorized payment methods.
- 8. Search feature: The intranet site must include a search feature for users to search by topic, key words, etc.
- 9. The intranet site must be accessible using a standard Internet browser. Users must have appropriate application software to open several of the templates and tools.
- 10. The intranet site must be available 24 hours a day, 7 days a week, with one hour per week for system maintenance and other periodic maintenance, as appropriate.

Summary of Project Deliverables

Project management-related deliverables: Business case, charter, team contract, scope statement, WBS, schedule, cost baseline, progress reports, final project presentation, final project report, lessons-learned report, and any other documents required to manage the project.

Product-related deliverables:

1. Survey: Survey current consultants and clients to help determine desired content and features for the intranet site.

- Files for templates: The intranet site will include templates for at least 20 documents when the system is first implemented, and it will have the capacity to store up to 100 documents. The project team will decide on the initial 20 templates based on survey results.
- 3. Examples of completed templates: The intranet site will include examples of projects that have used the templates available on the site. For example, if there is a template for a business case, there will also be an example of a real business case that uses the template.
- 4. Instructions for using project management tools: The intranet site will include information on how to use several project management tools, including the following as a minimum: work breakdown structures, Gantt charts, network diagrams, cost estimates, and earned value management. Where appropriate, sample files will be provided in the application software appropriate for the tool. For example, Microsoft Project files will be available to show sample work breakdown structures, Gantt charts, network diagrams, cost estimates, and applications of earned value management. Excel files will be available for sample cost estimates and earned value management charts.
- 5. Example applications of tools: The intranet site will include examples of real projects that have applied the tools listed in number 4 above.
- 6. Articles: The intranet site will include at least 10 useful articles about relevant topics in project management. The intranet site will have the capacity to store at least 1,000 articles in PDF format with an average length of 10 pages each.
- 7. Links: The intranet site will include links with brief descriptions for at least 20 useful sites. The links will be categorized into meaningful groups.
- 8. Expert database: In order to deliver an "Ask the Expert" feature, the system must include and access a database of approved experts and their contact information. Users will be able to search for experts by predefined topics.
- 9. User Requests feature: The intranet site will include an application to solicit and process requests from users.

- 10. Intranet site design: An initial design of the new intranet site will include a site map, suggested formats, and appropriate graphics. The final design will incorporate comments from users on the initial design.
- 11. Intranet site content: The intranet site will include content for the templates and tools sections, articles section, article retrieval section, links section, "Ask the Expert" section, User Requests feature, security, and payment features.
- 12. Test plan: The test plan will document how the intranet site will be tested, who will do the testing, and how bugs will be reported.
- 13. Promotion: A plan for promoting the intranet site will describe various approaches for soliciting inputs during design. The promotion plan will also announce the availability of the new intranet site.
- 14. Project benefit measurement plan: A project benefit plan will measure the financial value of the intranet site.

Project Success Criteria: Our goal is to complete this project within six months for no more than \$140,000. The project sponsor, Joe Fleming, has emphasized the importance of the project paying for itself within one year after the intranet site is complete. To meet this financial goal, the intranet site must have strong user inputs. We must also develop a method for capturing the benefits while the intranet site is being developed and tested, and after it is rolled out. If the project takes a little longer to complete or costs a little more than planned, the firm will still view it as a success if it has a good payback and helps promote the firm's image as an excellent consulting organization.

Work Breakdown Structure (WBS)

1.0 Initiating

- 1.1 Identify key stakeholders
- 1.2 Prepare project charter
- 1.3 Hold project kick-off meeting

2.0 Planning

- 2.1 Hold team planning meeting
- 2.2 Prepare team contract
- 2.3 Prepare scope statement
- 2.4 Prepare WBS
- 2.5 Prepare schedule and cost baseline
 - 2.5.1 Determine task resources
 - 2.5.2 Determine task durations
 - 2.5.3 Determine task dependencies
 - 2.5.4 Create draft Gantt chart
 - 2.5.5 Review and finalize Gantt chart
- 2.6 Identify, discuss, and prioritize risks

3.0 Executing

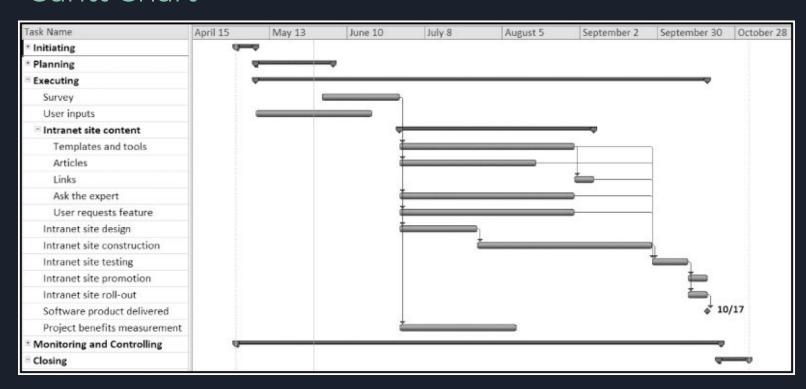
- 3.1 Survey
- 3.2 User inputs
- 3.3 Intranet site content
 - 3.3.1 Templates and tools

- 3.3.2 Articles
- 3.3.3 Links
- 3.3.4 Ask the Expert
- 3.3.5 User requests feature
- 3.4 Intranet site design
- 3.5 Intranet site construction
- 3.6 Intranet site testing
- 3.7 Intranet site promotion
- 3.8 Intranet site roll-out
- 3.9 Project benefits measurement
- 4.0 Monitoring and Controlling
 - 4.1 Progress reports

5.0 Closing

- 5.1 Prepare final project report
- 5.2 Prepare final project presentation
- 5.3 Lessons learned

JWD Consulting Intranet Site Project Baseline Gantt Chart



List of Prioritized Risks

RANKING	POTENTIAL RISK
1	Lack of inputs from internal consultants
2	Lack of inputs from client representatives
3	Security of new system
4	Outsourcing/purchasing for the article retrieval and "Ask the Expert" features
5	Outsourcing/purchasing for processing online payment transactions
6	Organizing the templates and examples in a useful fashion
7	Providing an efficient search feature
8	Getting good feedback from Michael Chen and other senior consultants
9	Effectively promoting the new system
10	Realizing the benefits of the new system within one year

Project Execution

Execution is the most time and resource consuming among all the 5 process groups.

The leadership skills of PM come into test during the project execution for handling challenges

Many project sponsors and customers focus on deliverables related to providing the products, services, or results desired from the project

A milestone report can help focus on completing the major milestones in a project

Execution process and outputs presented in next slides..

Knowledge Area	Executing Process	Outputs
Project Integration Management	Direct and manage project work	Deliverables Work performance data Change requests Project management plan updates Project documents updates
Project Quality Management	Perform quality assurance	Change requests Project management plan updates Project documents updates Organizational process assets updates
Project Human Resource Management	Acquire project team	Project staff assignments Resource calendars Project management plan updates
	Develop project team	Team performance assessments Enterprise environmental factor updates

Knowledge Area	Executing Process	Outputs
Project Integration Management	Direct and manage project work	Deliverables Work performance data Change requests Project management plan updates Project documents updates
Project Quality Management	Perform quality assurance	Change requests Project management plan updates Project documents updates Organizational process assets updates
Project Human Resource Management	Acquire project team	Project staff assignments Resource calendars Project management plan updates
	Develop project team	Team performance assessments Enterprise environmental factor updates
	Manage project team	Change requests Project management plan updates Project documents updates

		Enterprise environmental factors updates Organizational process assets updates
Project Communica- tions Management	Manage communications	Project communications Project documents updates Project management plan updates Organizational process assets updates
Project Procurement Management	Conduct procurements	Selected sellers Agreements Resource calendars Change requests Project management plan updates Project documents updates
Project Stakeholder Management	Manage stakeholder engagement	Issue log Change requests Project management plan updates Project documents updates Organizational process assets updates

Milestone	Date	Status	Responsible	Issues/ Comments
Initiating Stakeholders identified	May 2	Completed	Erica and Joe	
Project charter signed	May 10	Completed	Erica	
Project kick-off meeting held	May 13	Completed	Erica	Went very well
Planning Team contract signed	May 13	Completed	Erica	
Scope statement completed	May 27	Completed	Erica	
WBS completed	May 31	Completed	Erica	
List of prioritized risks completed	June 3	Completed	Erica	Reviewed with sponsor and team
Schedule and cost baseline completed	June 13	Completed	Erica	
Executing Survey completed	June 28		Erica	Poor response so far!

Best Practices

Following are some ways to learn about the best practices in project management:

By studying recipients of PMI's Project of the Year award.

https://www.pmi.org/about/awards/winners/past-year

2020 PMI Project of the Year Award Winner: TANAP Natural Gas Transmission Company

Energy security is a matter of national security in today's volatile marketplace. European countries are looking to diversify their power supply. One possible solution is a US\$6.5 billion pipeline stretching across Turkey, the Trans-Anatolian gas pipeline (TANAP)

Project Monitoring and Controlling

It primarily Involves

- 1. measuring progress toward project objectives,
- 2. monitoring deviation from the plan and
- 3. taking corrective actions

It affects all other process groups and occurs during all phases of the project life cycle

OUTPUTS: performance reports, change request and updates to various plans

Samples in next slides..

Knowledge Area	Monitoring and Controlling Process	Outputs
Project Integration Management	Monitor and control project work	Change requests Work performance reports Project management plan updates Project documents updates
	Perform integrated change control	Approved change requests Change log Project management plan updates Project documents updates
Project Scope Management	Validate scope	Accepted deliverables Change requests Work performance information Project documents updates
	Control scope	Work performance information Change requests Project management plan updates Project documents updates Organizational process assets updates

Project Time Management	Control schedule	Work performance information Schedule forecasts Change requests Project management plan updates Project documents updates Organizational process assets updates
Project Cost Management	Control cost	Work performance information Cost forecasts Change requests Project management plan updates Project documents updates Organizational process assets updates
Project Quality Management	Control quality	Quality control measurements Validated changes Validated deliverables Work performance information Change requests Project management plan updates Project documents updates Organizational process assets updates

Knowledge Area	Monitoring and Controlling Process	Outputs
Project Communications Management	Control communications	Work performance information Change requests Project documents updates Organizational process assets updates
Project Risk Management	Control risks	Work performance information Change requests Project management plan updates Project documents updates Organizational process assets updates
Project Procurement Management	Control procurements	Work performance information Change requests Project management plan updates Project documents updates Organizational process assets updates
Project Stakeholder Management	Control stakeholder engagement	Work performance information Change requests Project documents updates Organizational process assets updates

Weekly Progress Report Sample

Project Name: Project Management Intranet Project

Team Member Name: Cindy Dawson, cindy_dawson@jwdconsulting.com

Date: August 5

Work completed this week:

- -Worked with Kevin to start the intranet site construction
- -Organized all the content files
- -Started developing a file naming scheme for content files
- -Continued work on "Ask the Expert" and User Requests features
- -Met with preferred supplier
- -Verified that their software would meet our needs
- -Discovered the need for some customization

Work to complete next week:

- -Continue work on intranet site construction
- -Prepare draft contract for preferred supplier
- -Develop new cost estimate for outsourced work

What's going well and why:

The intranet site construction started well. The design was very clear and easy to follow. Kevin really knows what he's doing.

continued...

Weekly progress report - contd.

What's not going well and why:

It is difficult to decide how to organize the templates and examples. Need more input from senior consultants and clients.

Suggestions/Issues:

- -Hold a special meeting to decide how to organize the templates and examples on the intranet site.
- -Get some sample contracts and help in negotiating with the preferred supplier.

Project changes:

I think we can stay on schedule, but it looks like we'll need about \$10,000 more for outsourcing. That's doubling our budget in that area.

Project Closing

- Involves gaining stakeholder and customer acceptance of the final products and services
- Even if projects aren't completed, they should be closed out
- Incomplete yet terminated projects can be a lesson to learn from.

OUTPUTS: project files, lessons-learned reports - become parts of organizational process assets. Most projects also include a final report and presentation to sponsor/senior management.

Knowledge Area	Closing Process	Outputs
Project Integration Management	Close project or phase	Final product, service, or result transition Organizational process assets updates
Project Procurement Management	Close procurements	Closed procurements Organizational process assets updates

Lessons-learned report sample

Project Name: JWD Consulting Project Management Intranet Site Project

Project Sponsor: Joe Fleming

Project Manager: Erica Bell

Project Dates: May 2 – November 4

Final Budget: \$150,000

- Did the project meet scope, time, and cost goals?
 We did meet scope and time goals, but we had to request an additional \$10,000, which the sponsor did approve.
- 2. What were the success criteria listed in the project scope statement?

 Below is what we put in our project scope statement under project success criteria:
 - "Our goal is to complete this project within six months for no more than \$140,000. The project sponsor, Joe Fleming, has emphasized the importance of the project paying for itself within one year after the intranet site is complete. To meet this financial goal, the intranet site must have strong user input. We must also develop a method for capturing the benefits while the intranet site is being developed and tested, and after it is rolled out. If the project takes a little longer to complete or costs a little more than planned, the firm will still view it as a success if it has a good payback and helps promote the firm's image as an excellent consulting organization."
- 3. Reflect on whether you met the project success criteria.

 As stated above, the sponsor was not too concerned about going over budget as long as the system would have a good payback period and help promote our firm's image. We have

already documented some financial and image benefits of the new intranet site. For example, we have decided that we can staff the PMO with one less person, resulting in substantial cost savings. We have also received excellent feedback from several of our clients about the new intranet site.

- 4. In terms of managing the project, what were the main lessons your team learned from this project?

 The main lessons we learned include the following:
 - Having a good project sponsor was instrumental to project success. We ran into a couple of difficult situations, and Joe was very creative in helping us solve problems.
 - Teamwork was essential. It really helped to take time for everyone to get to know each other at the kick-off meeting. It was also helpful to develop and follow a team contract.
 - Good planning paid off in execution. We spent a fair amount of time developing a good project charter, scope statement, WBS, schedules, and so on. Everyone worked together to develop these planning documents, and there was strong buy-in.
 - Project management software was very helpful throughout the project.
- 5. Describe one example of what went right on this project.
- 6. Describe one example of what went wrong on this project.
- 7. What will you do differently on the next project based on your experience working on this project?

Sample: Final Project Report - Table of Contents

- 1. Project Objectives
- 2. Summary of Project Results
- 3. Original and Actual Start and End Dates
- 4. Original and Actual Budget
- 5. Project Assessment (Why did you do this project? What did you produce? Was the project a success? What went right and wrong on the project?)
- 6. Transition Plan
- 7. Annual Project Benefits Measurement Approach

Attachments:

- A. Project Management Documentation
 - Business case
 - Project charter
 - Team contract
 - Scope statement
 - WBS and WBS dictionary
 - Baseline and actual Gantt chart
 - List of prioritized risks
 - Milestone reports
 - Progress reports
 - Contract files
 - Lessons-learned reports
 - Final presentation
 - Client acceptance form

- B. Product-Related Documentation
 - Survey and results
 - Summary of user inputs
 - Intranet site content
 - Intranet site design documents
 - Test plans and reports
 - Intranet site promotion information
 - Intranet site roll-out information
 - Project benefits measurement information

Case Study: JWD Consulting's PM Intranet Site (Agile Approach)

Taking agile approach should not be impulsive rather it should be a well thought out decision, just like planning a journey or a road trip.

Agile approach is ideal for projects with less rigid constraints, experienced and preferably co-located teams, smaller risks, unclear requirements and more flexible scheduling.

This case study involves uses of SCRUM - Scrum roles, artifacts and ceremonies as part of the agile approach.

Roles 2 Scrum Master Scrum Team 3 **Product Owner Product Owner** Scrum Master Sprint Review Meeting **Events Release Planning Meeting** Implementation Scrum Team Stakeholders 4 Sprint Planning Meeting Members Impediment Log Sprint **SPRINT** Daily Scrum Sprint Retrospective **Sprint Review** Meeting **Burndown Chart Sprint Retrospective Artifacts** Planning Project Retrospective **Product Backlog User Stories** Meeting **Project Vision Epics** Sprint Backlog **Sprint Burndown** Sprint Planning Meeting Release Burndown Paradigm Release Plan Rules (bind the model together)

SCRUM Roles

- Product Owner: Person/Group responsible for the business value of the project and for deciding what work to do and in what order, as documented in the product backlog.
- SCRUM Master: The person who ensures that the team is productive.
 Responsibilities include -
 - Facilitating Daily Scrum
 - Enable close cooperation across all roles and functions
 - Remove barriers that prevent the team from being effective
- > SCRUM team or Development Team: A cross functional team of 5 to 9 people who organize themselves and the work to produce the desired results for each sprint, normally lasting 2-4 weeks.

SCRUM Artifacts

Artifacts are useful objects created by people. SCRUM artifacts include

PRODUCT BACKLOG: list of features prioritized by business value

SPRINT BACKLOG: The highest priority items from the product backlog to be completed within a sprint.

BURNDOWN CHART: shows the cumulative work remaining in a sprint on a day-by-day basis

Sprint Burndown - tasks remaining in a sprint

Release Burndown - tasks remaining after a version release

SCRUM Ceremonies/Events

Release Planning: Meeting to decide a feasible date for releasing a first version of the product and identify number of sprints required

Sprint Planning: Meeting with team to select a set of work from the product backlog to deliver during a sprint.

Daily Scrum: A short meeting for the development team to share progress and challenges and plan work for the day.

Sprint Reviews: A meeting in which the team demonstrates to the product owner what it has completed during the sprint.

Sprint Retrospectives: Meeting in which the team looks for ways to improve the product and the process based on a review of the actual performance of the development team.

Mapping SCRUM activities by Process Groups

Initiating:

- Determine roles
- Decide how many sprints will compose each release and the scope of software to deliver

Planning:

- · Create product backlog
- Create sprint backlog
- Create release backlog
- Plan work each day in the daily Scrum
- Document stumbling blocks in a list

Executing:

- · Complete tasks each day during sprints
- Produce a shippable product at the end of each sprint

Monitoring and Controlling:

- Resolve issues and blockers
- · Create and update burndown chart
- Demonstrate the completed product during the sprint review meeting

Closing:

Reflect on how to improve the product and process during the sprint reflection meeting

Planning

PMBOK Guide Similarities:

Still create a scope statement and can use Gantt chart for entire project

DIFFERENCES:

- Description of work are identified in product and sprint backlog
- More detailed work documented in technical stories
- Estimate a velocity or capacity for each sprint
- Release roadmap is often used for scheduling

JWD Sample - Product and Sprint Backlog

Product Backlog

- 1. User story templates, samples, and point person
- 2. WBS templates, samples, and point person
- 3. Project schedule templates, samples, and point person
- 4. Ability to charge customers for some intranet products and services
- 5. Ability to collect user suggestions
- 6. Business case templates, samples, and point person
- 7. Ask the Expert feature
- Stakeholder management strategy templates, samples, and point person
- Risk register templates, samples, and point person
- 10. Etc.

Sprint Backlog

- 1. User story templates, samples, and point person
- 2. WBS templates, samples, and point person
- Project schedule templates, samples, and point person
- 4. Ability to charge customers for some intranet products and services
- 5. Ability to collect user suggestions

Executing

PMBOK Guide Similarities:

Still produce products and involves leading people

DIFFERENCES:

- Produce several releases of software this might confuse some traditional customers by getting several iterations of the product instead of just one
- Communications is a more frequent as project team meets every morning either physically or virtually.

Monitoring and Controlling

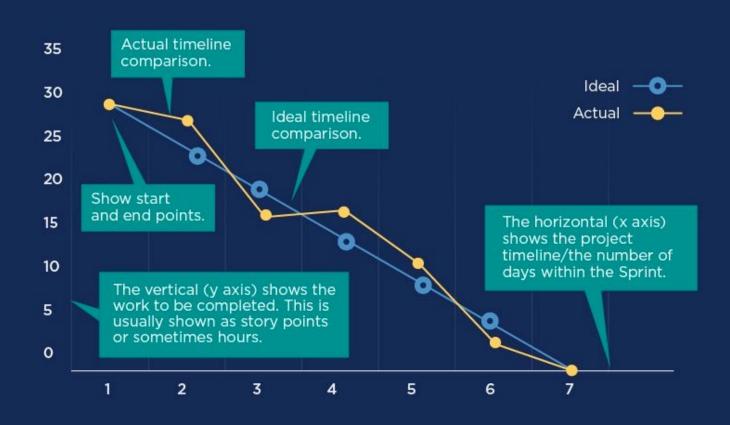
PMBOK Guide Similarities:

Still check actual work vs Planned work

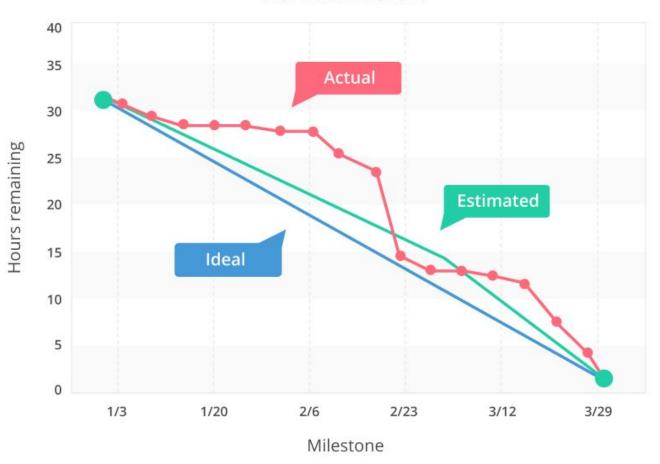
DIFFERENCES:

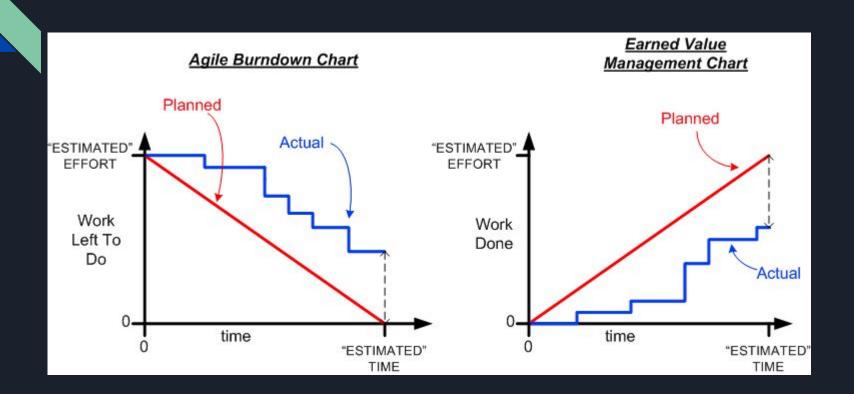
- Names of key reviews are the Daily SCRUM and the Sprint review
- A Sprint Board is used instead of a tracking Gantt chart or other similar tools
- A Burndown Chart is used instead of Earned Value Chart

Sprint Burndown Chart - Working



Burndown Chart





Closing

PMBOK Guide Similarities:

Still focuses on acceptance of deliverables and reflection

DIFFERENCES:

- Retrospective replaces lessons-learned report
- Retrospective i.e Lessons from past focuses on shorter time period and intends to answer 2 fundamental questions:
 - What went well during the last sprint that we should continue doing?
 - What could we do differently to improve the product or process?

Task For the Weekendexplore further on JWD Case Study

Please perform independent research and summarize key elements in this slide relative to JWD Case Study

Example Work/Sample Reference Link:

https://www.ukessays.com/essays/information-technology/the-core-objective-of-jwd-organisations-information-technology-essay.php

Kathy Schwalbe, Ph.D., PMP is a Professor Emeritus at Augsburg College in Minneapolis (retired in 2015) and is a renowned Project Management Professional (PMP) Certified publisher.

Please feel free to refer and research:

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THANKYOU happyweekends