



# **PMP® EXAM PREP**

PMI Authorized  
Training Partner

## **BOOTCAMP**

### **Session 1**

### **Part 2**

**Class will resume at 2:30pm EST**

Instructors:  
Barb Waters, MBA, PMP®  
Susan Daniels, MBA, PMP®

## **PMP® Exam Prep**

This course will assist learners in preparing  
for PMI's PMP Exam (2021 Update)

# Today's Session Topics (Mapped to the PMP Student Manual)

	<b>Creating a High-Performing Team</b> <b>Lesson 1</b>	<b>Starting the Project</b> <b>Lesson 2</b>	<b>Doing the Work</b> <b>Lesson 3</b>	<b>Keeping the Team on Track</b> <b>Lesson 4</b>	<b>Keeping the Business in Mind</b> <b>Lesson 5</b>
Topic A	Build a Team	<b>Determine Appropriate Project Methodology/Methods and Practices</b>	Assess and Manage Risks	Lead a Team	Manage Compliance Requirements
Topic B	Define Team Ground Rules	Plan and Manage Scope	Execute Project to Deliver Business Value	Support Team Performance	Evaluate and Deliver Project Benefits and Value
Topic C	Negotiate Project Agreements	Plan and Manage Schedule	Manage Communications	Address and Remove Impediments, Obstacles, and Blockers	Evaluate and Address Internal and External Business Environment Changes
Topic D	<b>Empower Team Members and Stakeholders</b>	Plan and Manage Budget and Resources	Engage Stakeholders	Manage Conflict	Support Organizational Change
Topic E	<b>Train Team Members and Stakeholders</b>	Plan and Manage Quality of Products and Deliverables	Create Project Artifacts	Collaborate with Stakeholders	Employ Continuous Process Improvement
Topic F	<b>Engage and Support Virtual Teams</b>	Integrate Project Planning Activities	Manage Project Changes	Mentor Relevant Stakeholders	
Topic G	<b>Build Shared Understanding about a Project</b>	Plan and Manage Procurement	Manage Project Issues	Apply Emotional Intelligence to Promote Team Performance	
Topic H		Establish Project Governance Structure	Ensure Knowledge Transfer for Project Continuity		
Topic I		Plan and Manage Project/Phase Closure			



# Empower Team Members and Stakeholders

TOPIC D

# Deliverables and Tools



Decisions  
Estimates



Team decision-making tools  
Brainstorming  
Fist of Five  
Roman voting  
Polling  
Planning poker  
Dot voting  
Retrospective

Empower  
Team  
Members  
LESSON 1  
TOPIC D

# Team Strengths

When forming teams, it's critical to understand the skills and competencies needed to perform project work and produce deliverables.

Identify team strengths and weaknesses to **organize around team strengths**.

As teams progress, leverage team members' skills to improve team performance.





# Team Decision-Making Tools

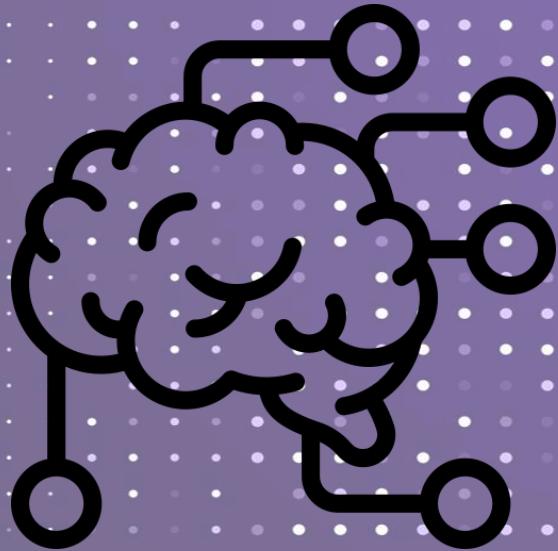
Deciding how you will work together is important. While the Team Charter addresses decision-making and conflict resolution criteria, the **team will establish their own norms**.

For example, seeking consensus may be highly desirable, but decide how to respond when consensus can't be reached.

The team can decide in advance to take the highest estimate in case of persistent disagreements.

Any project team should establish its own **Way of Working (WoW)**.

# Brainstorming



An **ideation technique** for teams.

A facilitator works with the team to identify potential solutions to a given problem.

Team performs various types of analysis to select the most appropriate alternatives.

Empower  
Team  
Members  
LESSON 1  
TOPIC D

# Estimates

People doing the work should be estimating tasks because they know:

- ✓ the risks
- ✓ the level of effort
- ✓ the potential pitfalls

**Traditional** - Use hours of effort.

- ✓ Three-point estimating asks the estimators to provide the most likely (tM); optimistic (tO); and pessimistic (tP) estimates then divide by three:

$$tE = (tO + tM + tP) / 3$$

- ✓ Other methods include analogous, parametric, bottom-up estimating

**Agile** - Avoid using absolute time estimates.

Story Point technique uses points, not time units, to estimate the difficulty of implementing a user story. It's an abstract measure of effort required to implement work.



Course: Deep Dive into Project Costs and Estimates (2021 Update)

Video: Three-point Estimating (6:34 run time)

**Watch from Start to 3:20**

**More  
about...**

---

## **Three-point Estimating**



# Team Task Accountability

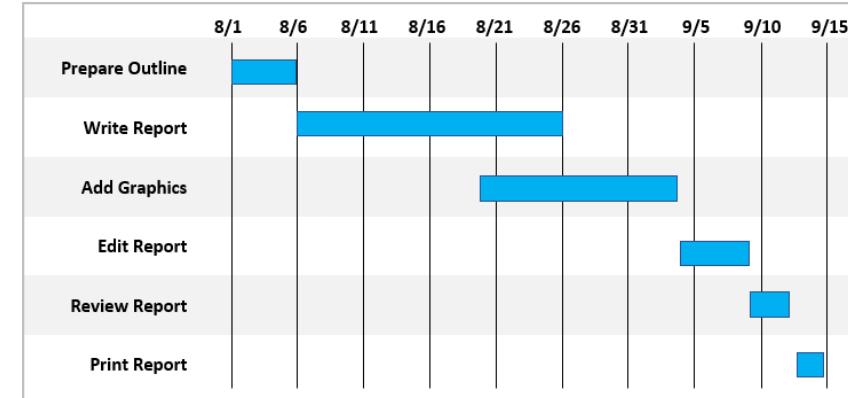
Encourage team members to self-organize in determining:

- ✓ What work needs to be done
- ✓ How to perform the work
- ✓ Who should perform it

Use Gantt charts and Kanban boards to promote visibility and collaboration.

**Agile** - Team commits to performing work in an iteration.

Empower  
Team  
Members  
LESSON 1  
TOPIC D



Gantt Chart



Kanban Board

## GUIDELINES

# Evaluate Demonstration of Task Accountability

- Determine how to track and manage task accountability.
- Use a Work Breakdown Structure (WBS) to identify the tasks needed to produce the deliverables.
- Identify, track, and manage relevant tasks and assignees with a WBS dictionary (or work package).
- Agile – The team handles task identification and tracking as part of iteration planning.

Empower  
Team  
Members  
LESSON 1  
TOPIC D



## GUIDELINES

# Determine and Bestow Levels of Decision-Making Authority

- Team members should identify, plan, and manage tasks
- Teams performing work should also perform estimates for the work
- Empower teams to drive their own improvement

Empower  
Team  
Members  
LESSON 1  
TOPIC D

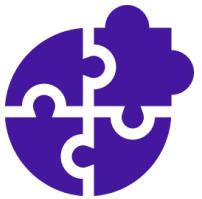




## Train Team Members and Stakeholders

TOPIC E

# Deliverables and Tools



- Training and mentoring plan
- Training cost estimates
- Training calendar
- Training assessment
- Certifications



- Training gap analysis
- Training
- Pairing and mentoring

Train Team  
Members and  
Stakeholders  
LESSON 1  
TOPIC E

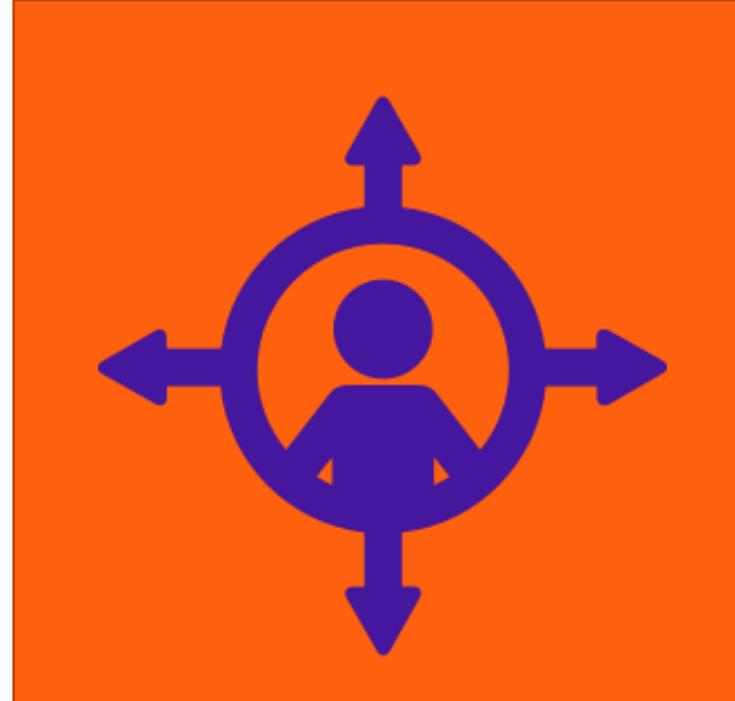
# Training and Coaching Plan



# Training and Coaching

**Training** focuses on building individual skills for use in the present.

**Coaching** helps develop well-rounded individuals through long-term professional relationships between novice and experienced employees.



Train Team  
Members and  
Stakeholders  
LESSON 1  
TOPIC E

# Training and Coaching Plan



Schedule training close to the time of solution implementation. This is critical to avoid delaying the overall solution deployment.



Perform a gap analysis to identify required knowledge, skills, or attributes.



Consider upskilling or certification for team members. This ultimately benefits the project.



Plan for a suitable diversity of training and coaching offerings.



## Required Competencies

- ✓ Identify required competencies prior to developing and executing a training plan.
- ✓ Competencies include knowledge, skills, and other attributes.
- ✓ Stakeholders have unique training needs.
- ✓ Train team members on the customer's business, culture, desired outcomes, and project context.

# Elements of Training

Provided to teams, small groups, and individuals

Covers management, technical, or administrative topics

Delivery models:

- ✓ Instructor-led classroom
- ✓ Virtual classroom
- ✓ Self-paced e-learning
- ✓ Document reviews
- ✓ Interactive simulations
- ✓ On-the-job training



# Training Options

Options	Description
Virtual Instructor-led training	<ul style="list-style-type: none"><li>• Live, online, instructor-led training through a virtual meeting or virtual training environment.</li><li>• Simulated hands-on labs are possible.</li></ul>
Self-paced eLearning	<ul style="list-style-type: none"><li>• Content available to students online. This can include rich-media video, simulated lab exercises, etc.</li><li>• This solution is scalable to a large number of students.</li></ul>
Document reviews	<ul style="list-style-type: none"><li>• For simple knowledge transfer, sharing relevant documents may be sufficient.</li></ul>



# Training Cost and Schedule

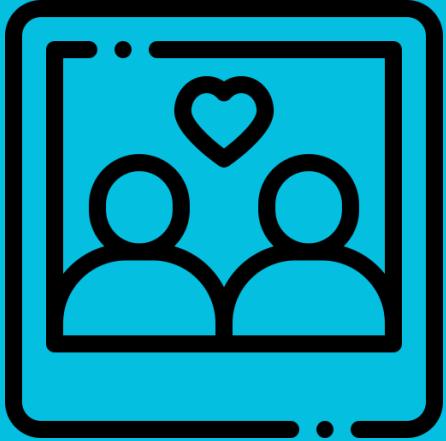
Consider the costs of training the project team and customer stakeholders as **part of the project budget**.

Use a training calendar to:

- ✓ Publish and support a specific calendar of training dates and locations.
- ✓ Publish schedule to customer stakeholders.
- ✓ Create a mechanism for registration and sending confirmation messages.
- ✓ Provide class rosters and a way to capture signatures of attendees.
- ✓ Manage the training schedule to avoid delaying the project delivery timeline.

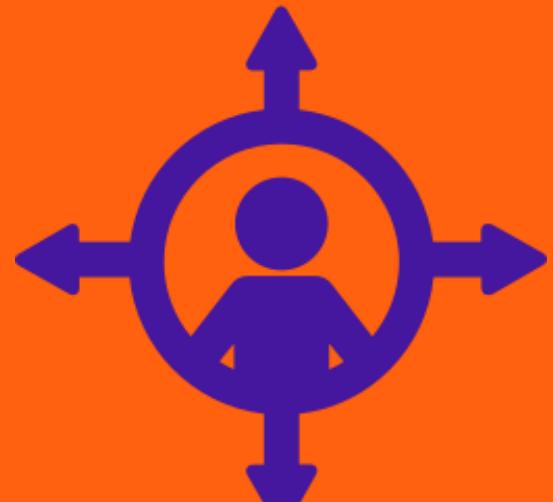


# Pairing and Coaching



Pairing customer stakeholders together reinforces the learning through collaboration.

Coaching enables an experienced team member to coach a less-experienced team member:



- ✓ Fosters team building and a collaborative environment.
- ✓ Relationships can be informal or ad-hoc, created by the individuals themselves or formally established by the organization.

# Certifications

Demonstrate that knowledge and skills have been gained during training.

Industry credentials are portable and valuable to individuals and future employers.



PMP

CAPM

PgMP

PMI-ACP

# Baseline and Post-Training Assessments

Baselining is a technique for measuring the efficacy of training.

- ✓ Attendees complete a pre-assessment **before** training.
- ✓ **After** training, use an assessment to demonstrate the newly acquired levels of competence.



## GUIDELINES

# Ensure Training Occurs

- Create awareness among stakeholders about available training.
- Invite people to attend training.
- Engage with customer to ensure commitment to employee training programs on the solution.
- Include confirmation of registration, a notification, and reminder before the training.
- Use rosters and capture signatures to confirm attendance and participation.

Train Team  
Members and  
Stakeholders  
LESSON 1  
TOPIC E





# Engage and Support Virtual Teams

TOPIC F

# Deliverables and Tools



Collaboration technology  
Engagement assessments  
Project or Resource Calendar



Communication  
Communication plan  
Variance analysis  
PM Powers

Engage and  
Support  
Virtual Teams  
LESSON 1  
TOPIC F

# Collaboration Technology

Enables teams to **plan, collaborate, and communicate.**

Not a substitute for team planning activities.

Consider **transparency requirements** when selecting collaboration technology.

Collaboration tools might include:

- ✓ Shared task boards - To promote visibility
- ✓ Messaging and chat boards - To enable communication
- ✓ Knowledge repositories - To store shared documents
- ✓ Video-conferencing tools - For face-to-face communication





# Virtual Team Member Needs

Facilitate and ensure collaboration as a priority.

Basic needs of a virtual team:

- ✓ Shared goals
- ✓ Clear purpose
- ✓ Clarity on roles and expectations

# Virtual Team Member Engagement

Manage engagement by focusing on:

- ✓ Team dynamics
- ✓ Transparency
- ✓ Accountability
- ✓ Attention to effective communication

Use videoconferencing tools to facilitate active participation and the ability to assess body language and tone.

Enable visibility of work and work status with tools e.g. Kanban-style boards.

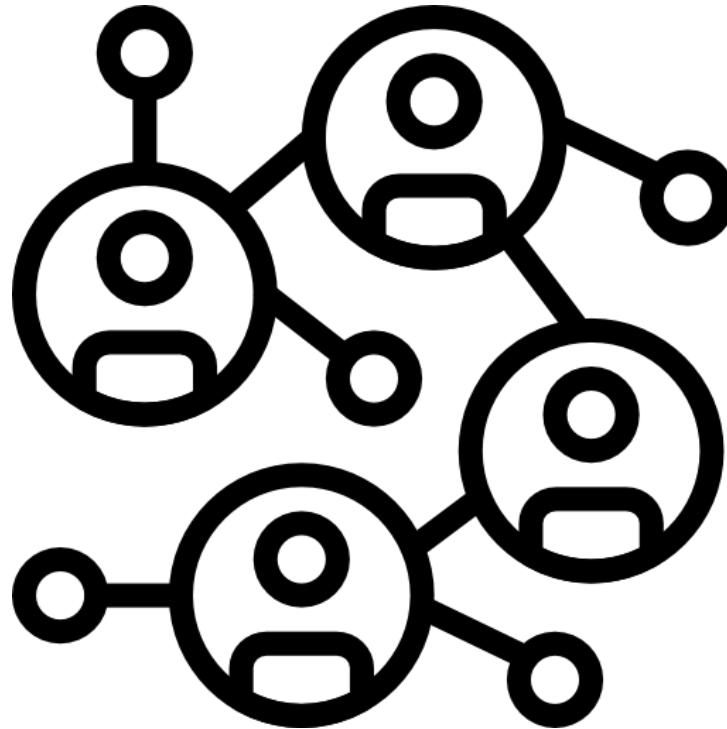


# Communication

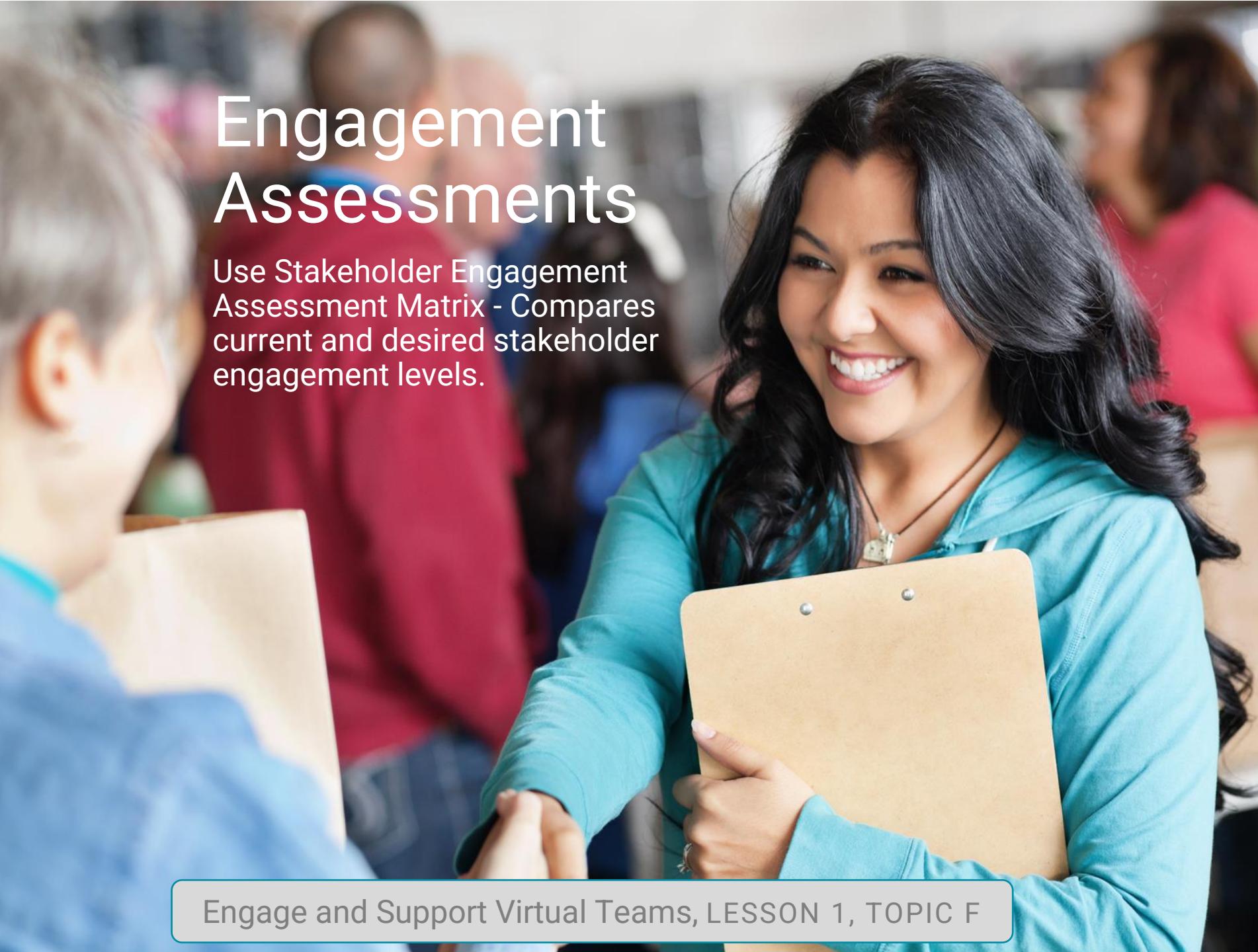
**Effective communication** is the key to successful teams.

Include communication expectations and details in the **team charter**.

Use **retrospectives** to learn ways of improving communication, collaboration, and use of visibility tools.



Engage and  
Support  
Virtual Teams  
LESSON 1  
TOPIC F

A photograph showing a woman with long dark hair, wearing a teal hoodie, smiling and holding a clipboard. She is part of a group of people, some of whom are visible in the background.

# Engagement Assessments

Use Stakeholder Engagement Assessment Matrix - Compares current and desired stakeholder engagement levels.



# Communications Plan

Create the initial team communications plan.

Components include:

- ✓ Team meeting times
- ✓ Tools to track work status
- ✓ Frequency of work status updates
- ✓ Shared team hours
- ✓ Preferred communication approaches

Encourage the team to adopt its own practices and drive iterative improvements to communication approaches.

Aim for effective collaboration and broad, accurate visibility across stakeholders.

## GUIDELINES

# Implement Options for Virtual Team Member Engagement

- Focus on collaboration and team norms before focusing on tools.
- Recognize that team formation in a virtual environment is difficult, so reinforce the teams' mutual commitments, achievements, and opportunities.
- Virtual teams require a significant amount of feedback and reinforcement of team goals and objectives.
- Provide opportunities for members of a virtual team to meet in person to build relationships that nurture their shared commitment to project goals.

Engage and  
Support  
Virtual Teams  
LESSON 1  
TOPIC F

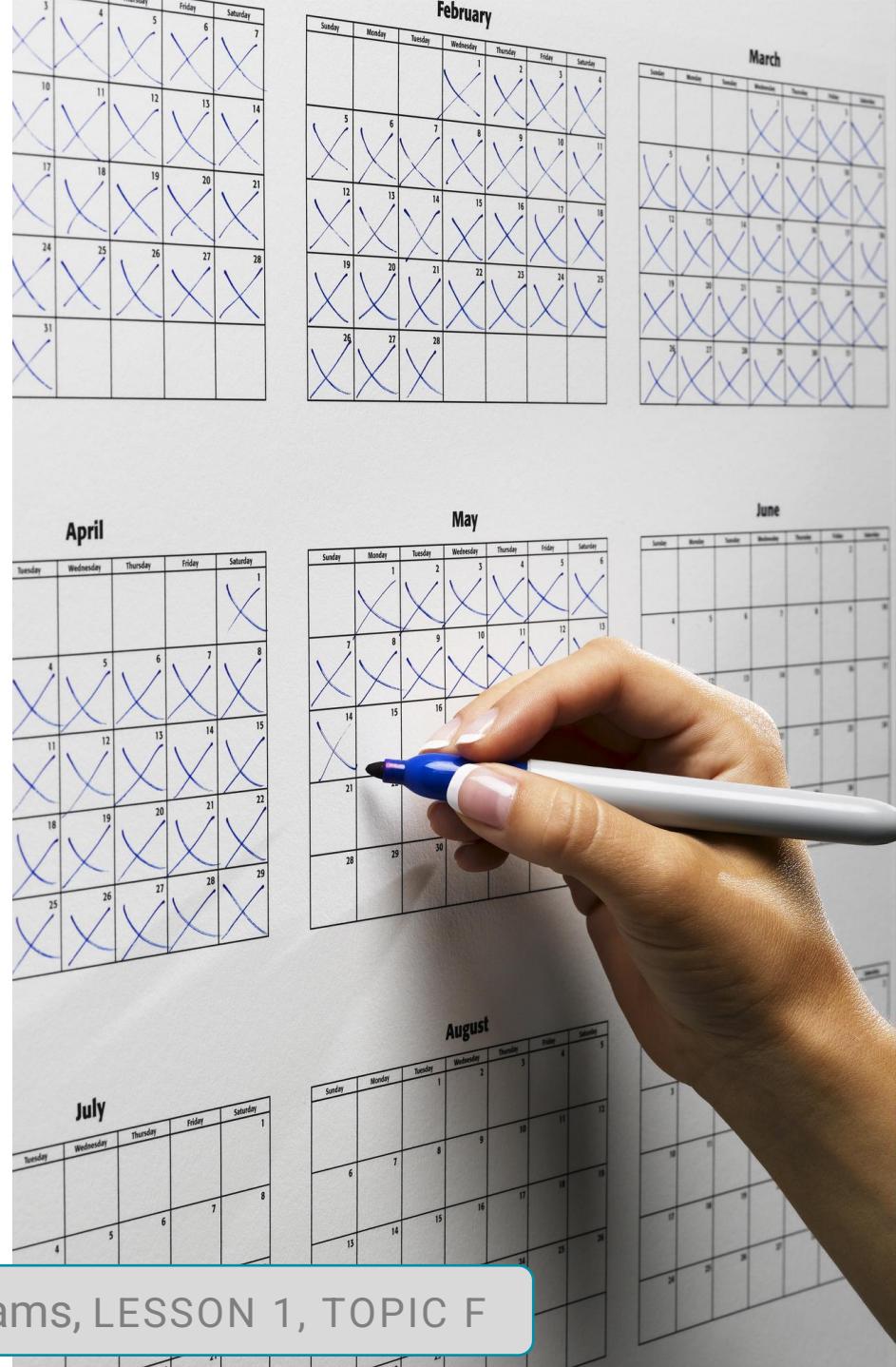


# Calendar Tools

Shared calendars help virtual teams plan meetings, coordinate feedback, and improve visibility to goals and activity status.

## Timeboxed meetings:

- ✓ Improve focus
- ✓ Encourage team to set clear agendas and objectives
- ✓ Help keep the work on track



# Variance Analysis

As the team works, produce variance analyses, such as:

- ✓ Accuracy of team estimates
- ✓ Delivery in a sprint or by an established milestone
- ✓ Team performance against targets

Results of a variance analysis may be shared as part of a retrospective to serve as:

- ✓ A basis for problem solving
- ✓ Identification of lessons learned
- ✓ Proposed improvement experiments for subsequent iterations



# Virtual Team Best Practices

Manage inherent risk of individual team members becoming isolated.

Focus on shared commitments vs. individual accomplishments for tasks.

Instill a sense of shared commitments in the team:

- ✓ Start with the team charter
- ✓ Then adopt behaviors to reinforce collaboration and promote visibility

Prioritize team goals over individual performance.

Enable teams to self-organize and be accountable for deliverables.





## Build a Shared Understanding About a Project

TOPIC G

CREATING A HIGH-PERFORMING TEAM > BUILD A SHARED UNDERSTANDING  
ABOUT A PROJECT

# Deliverables and Tools



Vision  
XP Metaphor  
Product box exercise



Charter  
Project Plan  
Kick-off meeting  
Brainstorming  
T-Shaped Skills

Build a Shared  
Understanding  
About a  
Project  
LESSON 1  
TOPIC G

# Project Vision

At the start of a project, you need a **clear vision of the desired objectives**. You also need to understand and appreciate how **the project vision aligns with the organization's strategic goals**.

You are the steward of this vision, and it's up to you as the project manager to ensure the project delivers.

A vision statement might include:

- ✓ Product or solution description
- ✓ Intended users or consumers of the solution
- ✓ Key desired objectives
- ✓ Differentiators from competitive approaches
- ✓ Key features and benefits





# Project Charter Contents

- ✓ **Assigned project manager and responsibility / authority level**
- ✓ **Name and authority of project sponsor**
- ✓ **Other optional content:**
  - Measurable project objectives and related success criteria
  - High-level requirements
  - High-level project description, boundaries, and key deliverables
  - Overall project risk
  - Summary of milestone schedules
  - Pre-approved financial resources
  - Key stakeholders register
  - Project approval requirements
  - Project exit criteria

# Project Overview Statement

Communicates enterprise-wide the **intent and vision** of the project.

Written with **brevity and clarity**.

Captures the project's **objective, problem or opportunity**, and **criteria for success**.

Authorization via the project charter or **approved project overview statement enables kickoff activities** of project planning.



# How to Run the Project

After you have captured the project vision and understand the types and conditions around the deliverables, **you need to decide** how you will run the project.

Choose from **traditional, agile, and hybrid** approaches and methods.





# Kickoff Meeting

Meeting goals:

- ✓ Establish project context
- ✓ Assist in team formation
- ✓ Ensure team alignment to the overall project vision

Activities during kickoff may include:

- ✓ Defining a vision statement
- ✓ Defining a team charter
- ✓ Assisting the customer/Product Owner with:
  - User story writing
  - Estimation of effort
  - Prioritization planning
  - Initial product backlog

# Iteration Planning

Iteration planning is a collaborative agile ceremony, sometimes called **Sprint planning**, for the team and the customer representative (or Product Owner) to do the following:

- ✓ Review the highest prioritized user stories, or key outcomes.
- ✓ Ask questions.
- ✓ Agree on forecasts for story completion in the current iteration.

After agreement, the team determines the activities required to deliver iteration objectives.



# Reach Consensus

Method	Best for	How It Works
Fist of Five	Expression of range of agreement	Closed fist = complete disagreement Fist of 5 – complete agreement
Roman Voting	Simple yes or no	Thumbs up or down (sometimes sideways for neutral)
Polling	Consider independent points of view	Hear opinions and then vote
Dot Voting	Select several options from a list	Distribute dots equally, then each person allocates dots according to highest preference

## GUIDELINES

# Reach Consensus and Support the Outcome of the Parties' Agreement

- Team charter can specify how team chooses to handle certain scenarios and disagreements when they arise:  
e.g. if team members disagree about the number of story points to estimate for a user story, the team charter may designate use of the higher estimate or that majority vote rules.
- Seek consensus among the team where possible and recognize that sometimes it will not be possible.

Build a Shared Understanding About a Project  
LESSON 1  
TOPIC G



## LESSON 2

# STARTING THE PROJECT

- Determine Appropriate Project Methodology/ Methods and Practices
- Plan and Manage Scope
- Plan and Manage Schedule
- Plan and Manage Budget and Resources
- Plan and Manage Quality of Products and Deliverables
- Integrate Project Planning Activities
- Plan and Manage Procurement
- Establish Project Governance Structure
- Plan and Manage Project/Phase Closure





# Determine Appropriate Project Methodology/Methods and Practices

TOPIC A

# Deliverables and Tools



- |                                      |  |
|--------------------------------------|--|
| Surveys                              | Expert judgement                           |
| Project business case/needs document | Meetings                                   |
| Project Overview Statement           | Focus groups                               |
| Project Implementation Plan          | Workshops                                  |
| Agile practice guidelines            | SMART objectives                           |
|                                      | Knowledge of classic PM and agile practice |
|                                      | Project Integration                        |

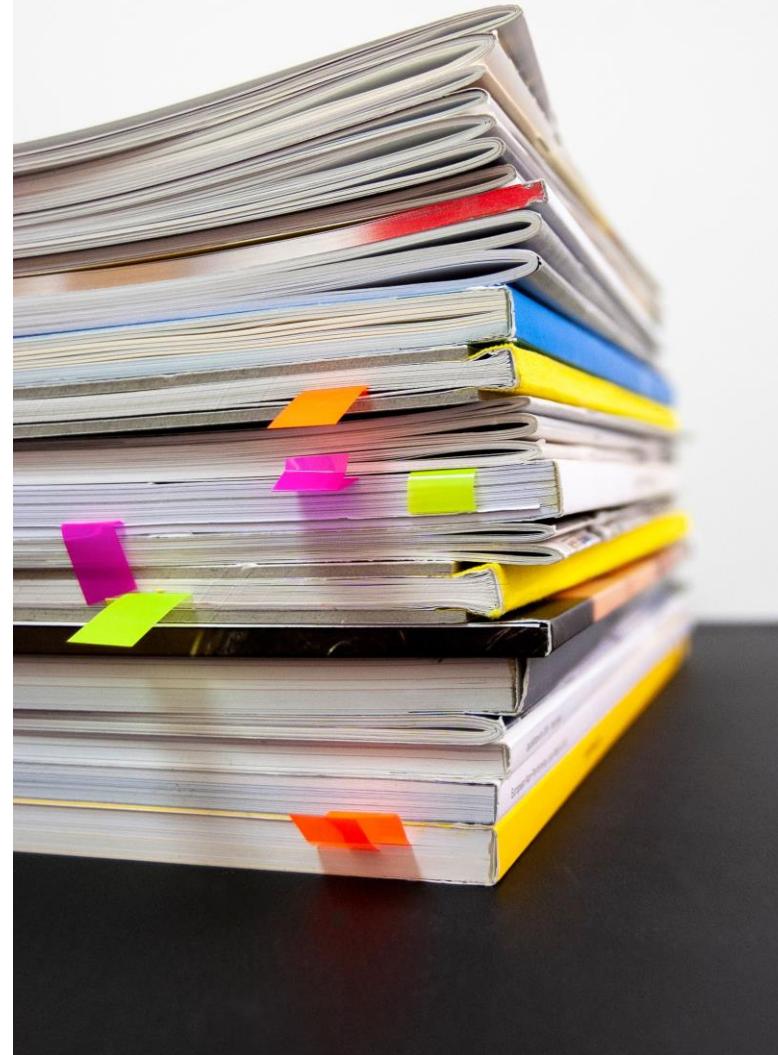
# Business Case and Business Needs Documents

## **Business case:**

- ✓ Documented economic feasibility study
- ✓ Establishes benefits of project components
- ✓ Provides a basis for authorization of further project activities

## **Business needs documents:**

- ✓ Provide high-level deliverables
- ✓ Prerequisite of formal business case
- ✓ Describe requirements - what needs creating and / or performing



Determine Appropriate Project Methodology/Methods and Practices, LESSON 2, TOPIC A



# Project Implementation Plan

Consider all stakeholders, schedules, risks, budgets, and quality standards.

Identify deliverables - due at the end of the project.

Identify project outputs - delivered throughout the project.

When delivering outputs, are we:

- ✓ Implementing them in a new or existing business environment?
- ✓ Transitioning them into a live environment?
- ✓ Decommissioning or removing old systems, processes, or materials?
- ✓ Ensuring training and knowledge transfer is complete / satisfactory?

# Rolling Wave Planning

- ✓ Used in agile or predictive approaches
- ✓ A form of progressive elaboration applied to work packages, planning packages, and release planning
- ✓ Decompose work down to the known level of detail during strategic planning
- ✓ Decompose work packages into activities as work progresses



Determine Appropriate Project Methodology/Methods and Practices, LESSON 2, TOPIC A

# Overview: Project Management Methodologies, Methods, and Practices

## Agile

- Team works collaboratively with the customer to determine the project needs.
- The coordination of the customer and the team drives the project forward.

## Predictive / Plan-Driven

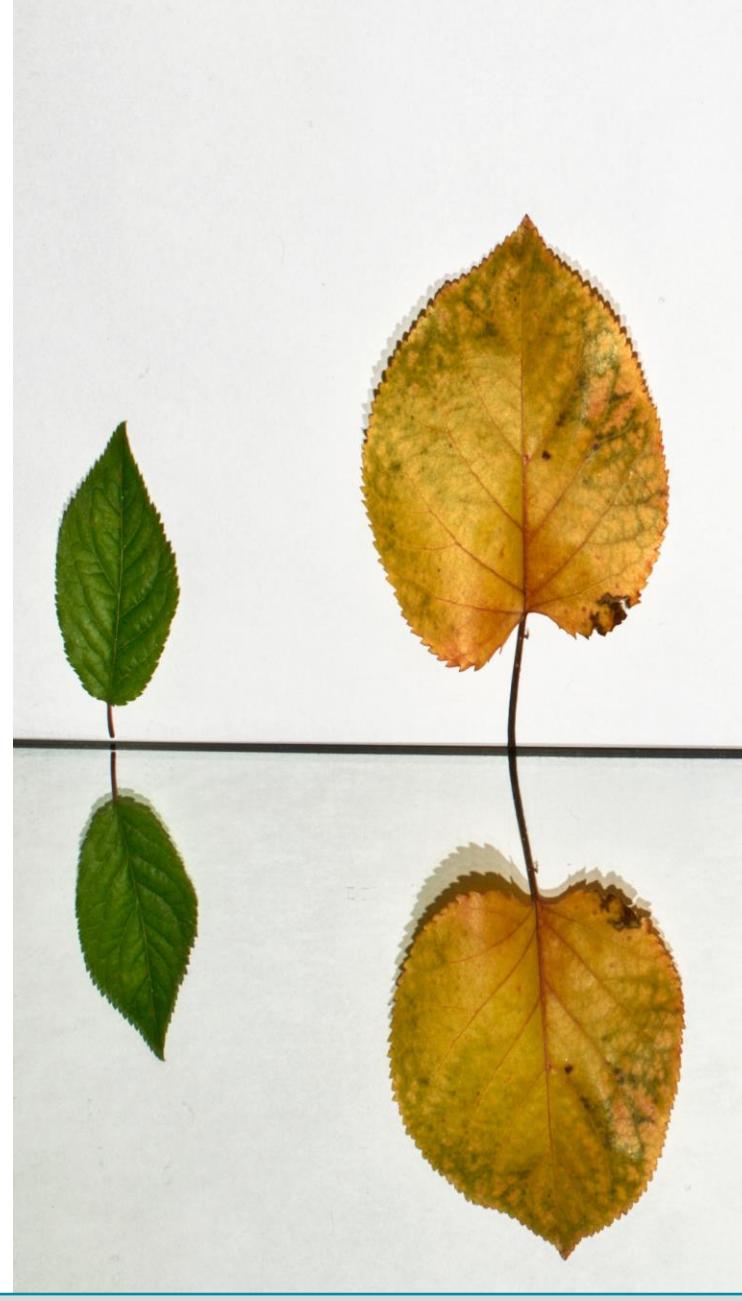
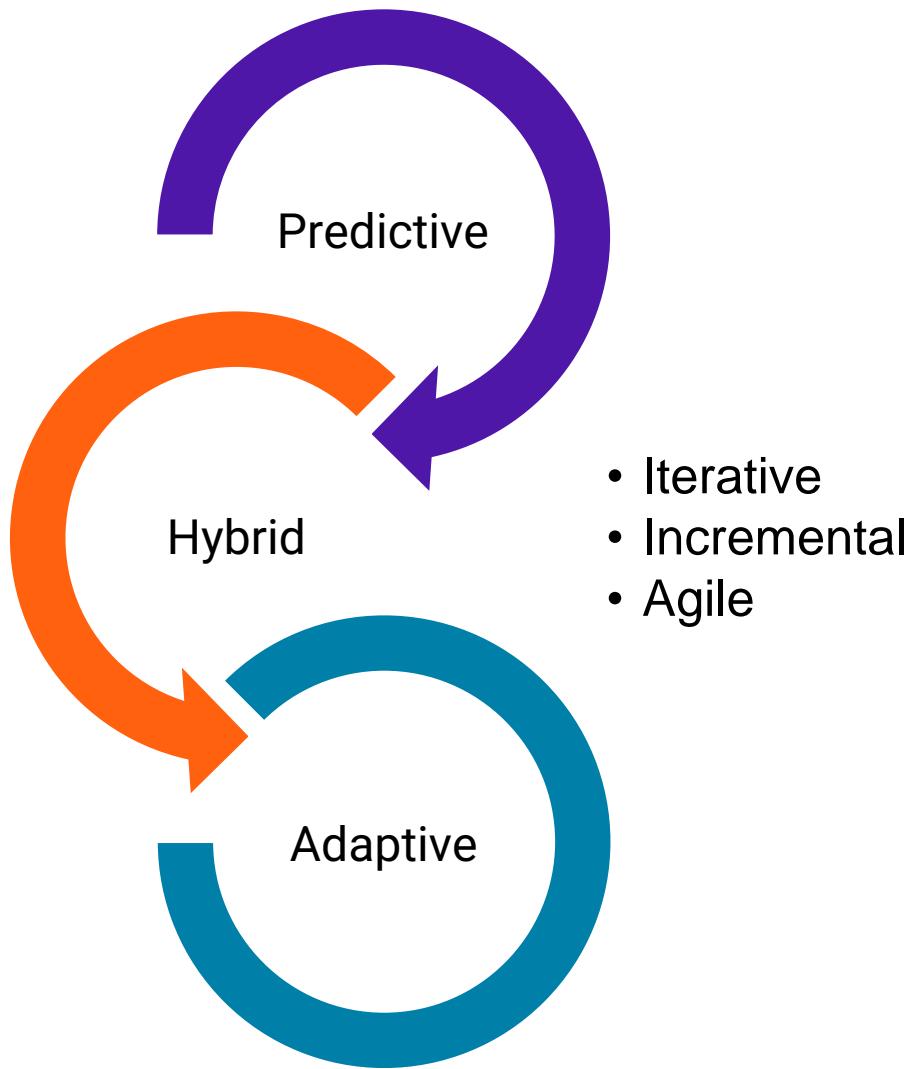
- Project needs, requirements, and constraints are understood, and plans are developed accordingly.
- Plans drive the project forward.

## Hybrid

- Combines strategies from agile or predictive as required.
- Can switch approaches based on need, changing work requirements, or circumstances.

Determine Appropriate Project Methodology/Methods and Practices, LESSON 2, TOPIC A

# Types of Life Cycles

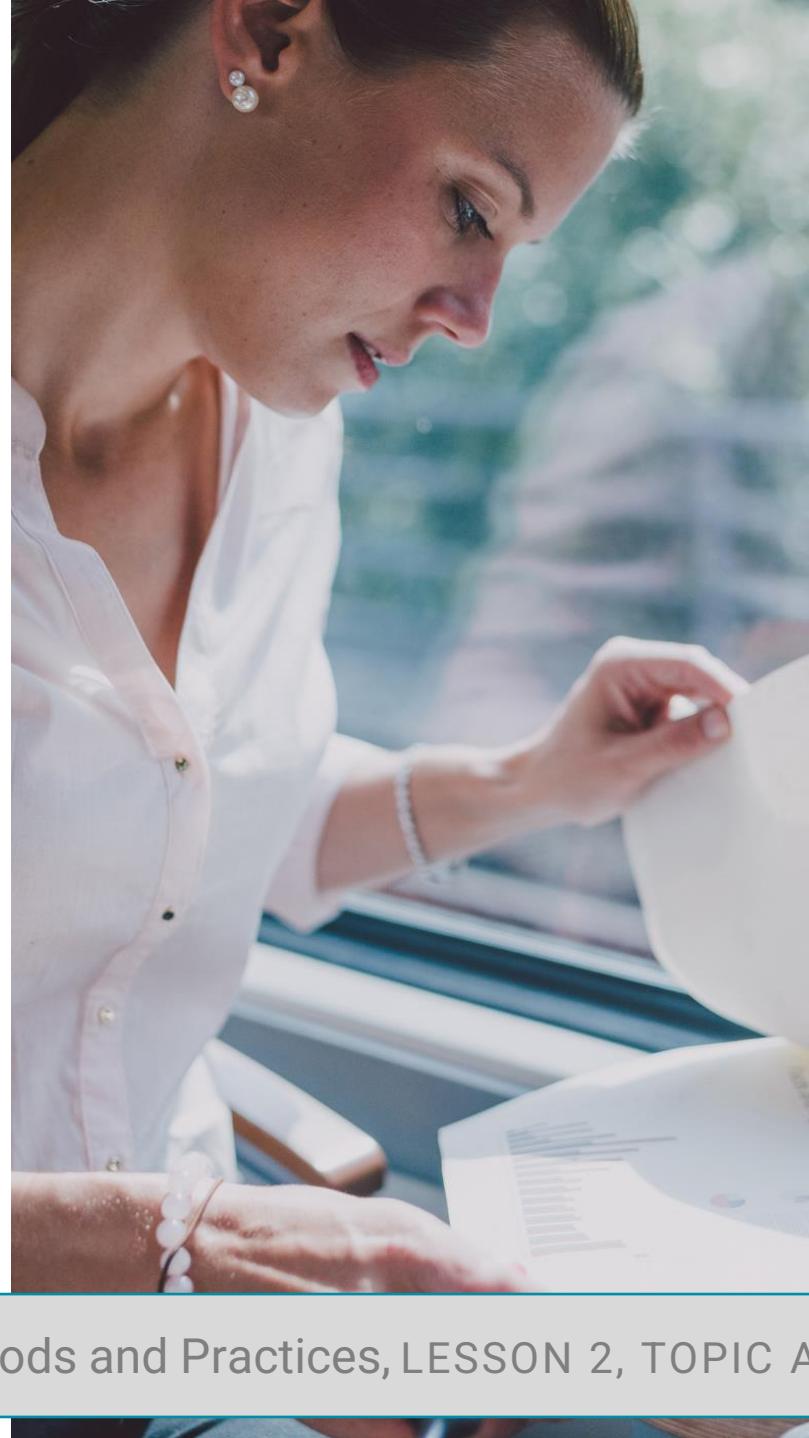


Determine Appropriate Project Methodology/Methods and Practices, LESSON 2, TOPIC A

# Predictive Life Cycle

Also known as **Traditional or Waterfall** approach:

- ✓ Requirements are typically fixed, but can be changed using the change control process
- ✓ Activities and work culminate in final output, always a deliverable



Determine Appropriate Project Methodology/Methods and Practices, LESSON 2, TOPIC A



## Adaptive and Hybrid Life Cycles

Use these methods in dynamic and complex environments, where change is a constant.

Let's learn more about these methods next.

# Hybrid Methods

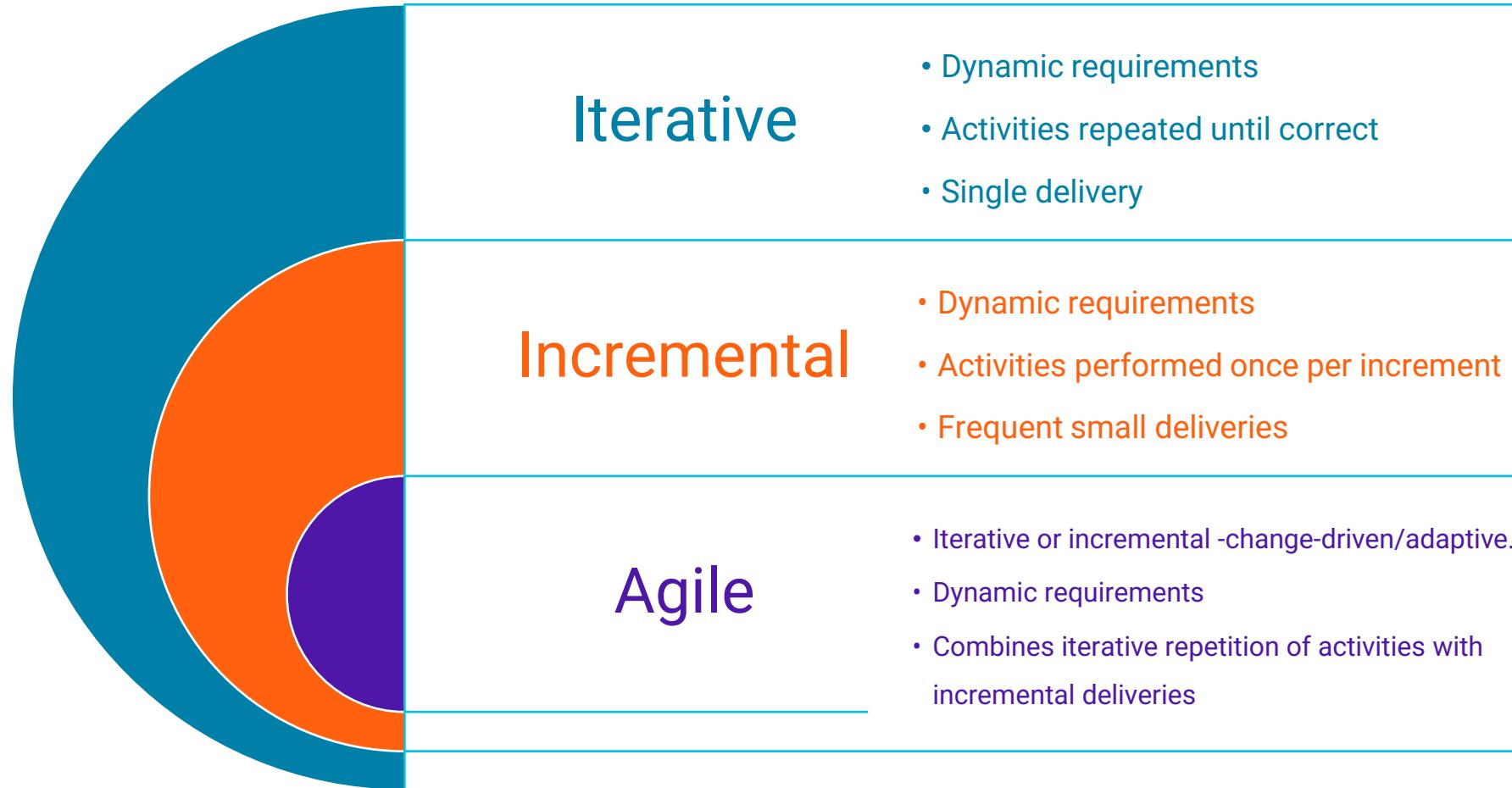
Combine predictive and adaptive approaches to offer flexibility to teams.

Great for projects:

- ✓ Seeking or willing to learn new methods or techniques.
- ✓ With a mix of resources and experience levels
- ✓ With shorter, iterative time frames.
- ✓ With high stakeholder involvement
- ✓ With in-depth requirements

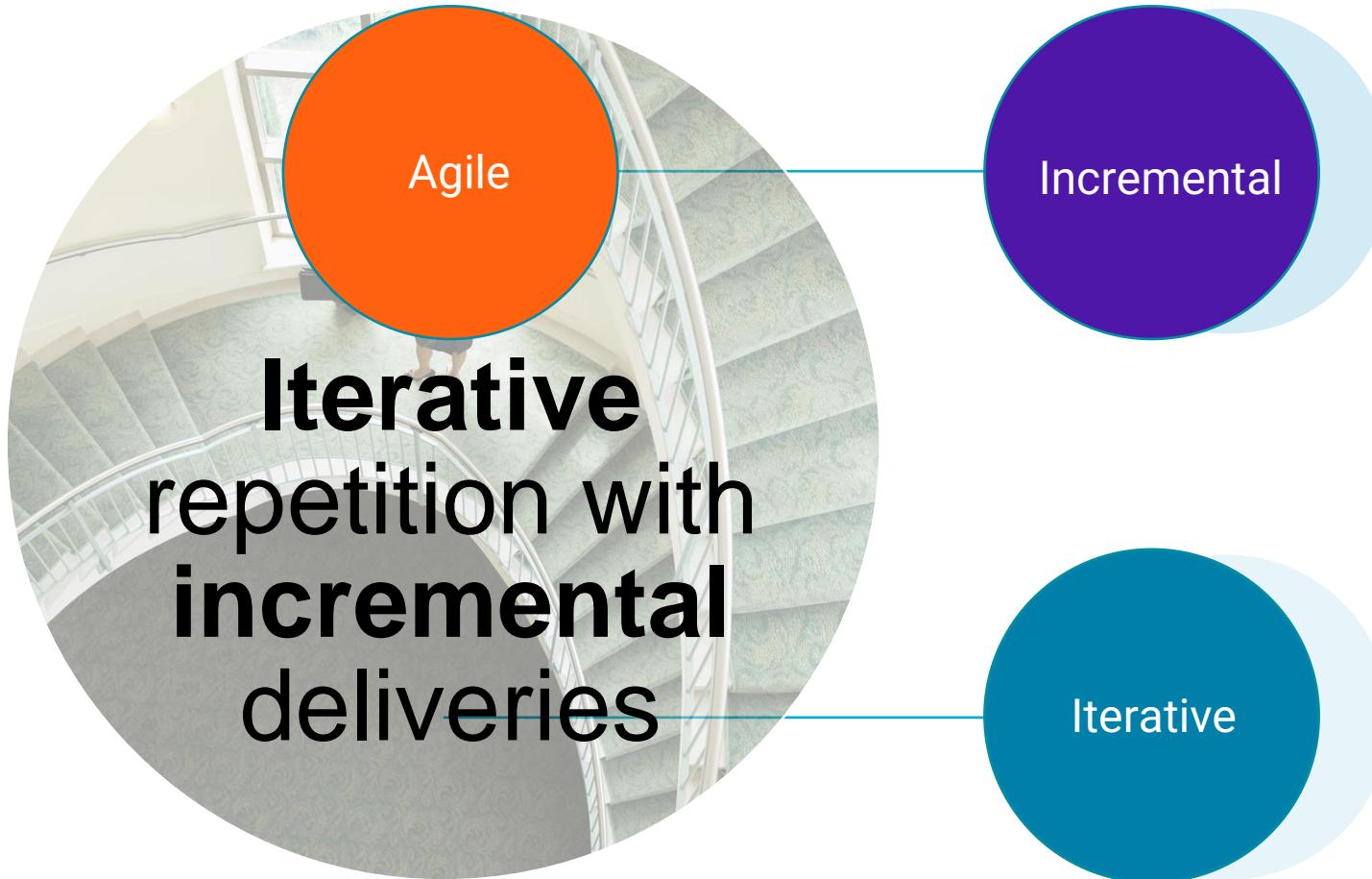


# Adaptive Life Cycles



Determine Appropriate Project Methodology/Methods and Practices, LESSON 2, TOPIC A

# Adaptive Life Cycles



Determine Appropriate Project Methodology/Methods and Practices, LESSON 2, TOPIC A

# Typical Use Cases

Methodology	Typical Use Cases
Agile	<ul style="list-style-type: none"><li>• Software projects</li><li>• Intellectual property projects</li><li>• Research projects</li></ul>
Predictive / Plan Driven	<ul style="list-style-type: none"><li>• Construction projects</li><li>• Projects with many physical assets</li><li>• “Repeats” of similar, completed projects</li></ul>
Iterative	Projects where learning and correction is expected to eventually reach the ideal solution.
Incremental	Customers or business wants or expects to see outputs or partial outputs early and often.
Hybrid	<ul style="list-style-type: none"><li>• Mix of resources and experience levels</li><li>• Those seeking or willing to learn new methods or techniques.</li></ul>

Determine Appropriate Project Methodology/Methods and Practices, LESSON 2, TOPIC A

Course: Exploring Project Management, Then and Now (2021 Update)  
Video: Comparison of Project Life Cycles (1:51 run time)

More  
about...

## Comparison of Project Life Cycles



# MASTERY BUILDER

Which of the following should be included in a Communications plan? (Choose two.)

- How and when team meetings are run
- Equipment assigned to each team member
- Project Charter
- Preferred communications approaches with external stakeholders

Creating a  
high  
performing  
team



# MASTERY BUILDER

Which of the following should be included in a Communications plan? (Choose two.)

- How and when team meetings are run
- Equipment assigned to each team member
- Project Charter
- Preferred communications approaches with external stakeholders

Creating a  
high  
performing  
team



# MASTERY BUILDER

Which of the following are examples of virtual team collaboration tools? (Choose two.)

- Shared task boards
- Your laptop hard drive
- Social media
- Team chat boards

Creating a  
high  
performing  
team



# MASTERY BUILDER

Which of the following are examples of virtual team collaboration tools? (Choose two.)

- Shared task boards
- Your laptop hard drive
- Social media
- Team chat boards

Creating a  
high  
performing  
team



# MASTERY BUILDER

Which of the following is a good practice for the use of collaboration tools?

- Select tools with the best features.
- Select tools that the team lead has experience using.
- Define team goals and practices before consideration of what tools the team will need.
- Use the tools that the previous project used.

Creating a  
high  
performing  
team



# MASTERY BUILDER

Which of the following is a good practice for the use of collaboration tools?

- Select tools with the best features.
- Select tools that the team lead has experience using.
- Define team goals and practices before consideration of what tools the team will need.
- Use the tools that the previous project used.

Creating a  
high  
performing  
team



# DAILY BOOTCAMP SURVEY

**Please share your thoughts.**

At the end of each Bootcamp session please let us know how we are doing. Your feedback helps us to offer the best possible Bootcamp experience.

**Thank you for attending Session 1!**