



PMP® EXAM PREP

PMI Authorized Training Partner

BOOTCAMP

Session 1

Attendance Alert

Percipio Users: Name is based
on your information in
Percipio

Using Zoom: Enter your first
and last name

PMP® Exam Prep

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

Your Instructor

Susan Daniels, MBA PMP DASSM ATP-I

linkedin.com/in/susandanielspmp



Program Director
Project Mgmt. graduate degrees



Sr. Strategy Integrator
a \$12 billion enterprise in the healthcare field



Executive Director
a multimillion-dollar social services agency



PMI Global Consultant

- Certification Requirements Global Taskforce
- 7th edition PMBOK Standards
- PMP Core Curriculum Co-author
- Northeast Florida Chapter Board of Directors



Your Instructor

Priscilla Kagwiria Bakx-Kabai

Go ROHO:

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Priscilla is **passionate about people and projects**. She helps project professionals to become great by providing training and coaching in hard and soft skills that are founded on a People First Mindset. Priscilla is an **Authorized Training Partner Instructor** (ATP-I) of the Project Management Institute, the **PMO Officer** at Ricoh Europe Supply Chain BV and a certified **Mindset Coach** and **Change Facilitator** by The Arbinger Institute. Her professional vision is captured in the name of her company, **Go ROHO**, which stands for **Go Reach One Help One**. Three words that best describe Priscilla's way of working are **Engagement, Communication, and Teamwork**.



Your Instructor

Orlando Sequera, MSPM, PMP®

www.linkedin.com/in/orlando-sequera-mspm-pmp®-pmi-acp-dasm-dassm-psm-3414478

Orlando Sequera is a certified Project Management Professional (PMP)®, Disciplined Agile Scrum Master (DASM)®, and PMI Agile Certified Practitioner (PMI-ACP)® with over 15 years experience in IT and Aerospace. Most recently, he managed software development projects for the Artemis program with NASA to land the first woman and the next man on the Moon. Orlando received his Bachelor's degree in Systems Engineering from Universidad Santa Maria – Venezuela and his Master's degree in Project Management from Boston University.



Scheduled Breaks



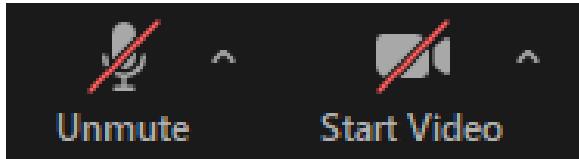
Part 1	Periodic breaks
1 –hour break	At the 3.5 Hour Mark
Part 2	Periodic breaks

For attendance purposes, please stay logged in during all breaks.

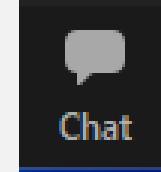


Ways to Participate in a Webinar

We are saving everyone's bandwidth usage by disabling cameras and microphones



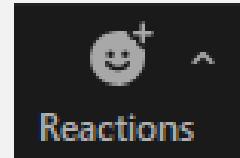
Find the Chat option in your Zoom command bar



Change the To: choice in the blue box to everyone.

To: Everyone ▾

Explore the Reactions option in your Zoom command bar



This is a fun way to provide quick and easy feedback

Using Zoom: Chat vs. Q&A

Please use the **Chat** to:

- Respond to instructor's questions
- Share your preferred tools and techniques
- Communicate with other participants
- Questions do not go in the chat
- The chat may be slowed as needed, to minimize disruptions

Please use the **Q&A** for:

- Technical assistance – Begin with: Percipio or Non-Percipio student
- Guidance on how to access course material – Begin with: Percipio or Non-Percipio
- Clarification and questions on lecture points, if not answered by instructor

Please be very patient, the support team responds to many inquiries per session.

Upvoting in the Q&A

- Questions will be visible to all participants
- Do you like a particular question? Click to upvote!
- Sort by “most upvotes” to see most popular questions
- Look at existing questions before typing a new one, to avoid duplicates
- Top questions will be selected and answered live (with instructor discretion)
- Priority will be given to managing technical issues.
- Not every question will be answered.

Great questions:

- are related to the course content
- include topics that everyone would benefit from learning
- are not spread across multiple posts

The screenshot shows a digital interface for a Q&A session. At the top, there are three colored circles (red, yellow, green) followed by the text "Q&A". Below this, there are two tabs: "All questions (3)" (which is blue and highlighted) and "My questions (2)". To the right of these tabs is a button labeled "Most Upvotes" with a dropdown arrow, which is circled in yellow. The main area displays three questions listed vertically. The first question is from "Lena Oxton" at 9:14 AM, asking if anyone has used all the new webinar features, with a blue thumbs-up icon and the number "2" indicating it has been upvoted twice. The second question is from "David Lu" at 9:10 AM, asking how many people can watch the webinar, with a blue thumbs-up icon and the number "1" indicating it has been upvoted once. The third question is from "Ana Amari" at 9:13 AM, asking if the webinar is being recorded, with a blue thumbs-up icon and no numerical count shown. At the bottom of the screen is a light gray input field with the placeholder text "Type your question here...".

Accessing Your Bootcamp Resources – Percipio Users

Check Your Specific Bootcamp
Channel for Your Resources

- Project Management Professional (PMP) ATP Bootcamp: 5 Day Cohort
- Project Management Professional (PMP) ATP Bootcamp: 8 Day UK Cohort
- Project Management Professional (PMP) ATP: 8 Day NA Cohort
- Project Management Professional (PMP) ATP: 8 Day Australia Cohort

This screenshot shows a learning platform interface for a PMP ATP bootcamp. At the top, there is a banner with the text: "This Bootcamp provides Project Managers with the knowledge and skills needed to attain the Project Management Professional (PMP) certification. This course meets the 35-hour classroom requirement for...". Below the banner is a "View More" button.

The main navigation bar includes tabs for "Courses" (highlighted with a yellow box), "Books", "TestPrep", and "Register and Join Sessions". Below the navigation bar are four action buttons: "Watch" (red), "Read" (green), "Practice" (blue), and "Attend" (purple).

A sidebar on the right contains links for "Bootcamp Documents and Other Files" and "Resources".

The main content area displays a course titled "PMP ATP Attendance 5-Day and 8-Day" with a duration of "8m 33s". A callout box titled "Best Practices for attendance!" provides instructions for PMI live attendance requirements, including a "You are here!" location pin icon.

Course details include:

- COURSE: PMP ATP Attendance 5-Day and 8-Day
- DURATION: 8m 33s
- DESCRIPTION: Learn how attendance is tracked.

Accessing Your Bootcamp Resources - All Other Users

Check Your Learning Portal for any Available Courses, Books or TestPrep exam

Check the Specific GitHub Link for Your Bootcamp Documents and Other Files

- Attending a 5-Day Bootcamp
- <https://github.com/Skillsoft-Content/PMP5Day>
- Attending an 8 Day Bootcamp
- <https://github.com/Skillsoft-Content/PMP8Day>

*Archive Resources Aug to Dec 2022	Add files via upload	3 days ago
*Archive Resources July 2022	Add files via upload	last week
5-Day Attendance and Certificates of...	Add files via upload	last week
Class Links	Add files via upload	last week
Documents (Syllabus, Exam Content ...)	Add files via upload	last week
Lunch Break Videos	Delete Placeholder	yesterday
PMP Learner Kit Information	Delete PMP ATP Learner Kit Info Jan 6 2023.pdf	1 minute ago
Slide Decks	Delete Placeholder	3 days ago
Vocabulary Slides	Delete Placeholder	yesterday
5-Day	Current Bootcamp Docs and Other Files	yesterday
*Archive Resources Aug to Dec 2022	Delete Placeholder	3 days ago
*NA Cohort Aug Sep Oct 2022 Bootc...	Delete Test.txt	4 months ago
*NA Cohort Jun Jul Aug 2022 Bootca...	Delete Test	4 months ago
*UK and APAC Cohort Jul Aug Sep 20...	Delete Test.txt	4 months ago
8-Day Attendance and Certificates of...	Delete Placeholder	3 days ago
Class Links	Add files via upload	4 days ago
Documents (Syllabus, Exam Content ...)	Add files via upload	4 days ago
PMP Learner Kit Information	Delete Placeholder	4 days ago
Slide Decks	Create Placeholder	3 days ago
Vocabulary Slides	Create Placeholder	3 days ago
8-Day	Current Bootcamp Documents and Other Files	3 days ago

Logging In with Correct Name for Attendance

- Your name should be the same as in your Learning Platform (EX: Percipio, Skillport, etc.) or Zoom account when joining through the Zoom app or client, or the name you input before joining directly using the Zoom link.
- **Joining from your Learning Portal:** If you can't see your name during the live session check to make sure your first and last name is correct in your Learning Portal. If it is not visible in your learning portal, check a **course completion certificate** (if available) or ask the **Admin** within your training organization. If you don't know whom that person is, please reach out to Skillsoft Support support@skillsoft.com to see if they can provide their contact details.
- **Joining through Zoom:** If you join through Zoom using the Desktop Client or Phone App, please use a Zoom account created through Zoom that has your First and Last Name. If you join through the browser link, please enter your First and Last Name when prompted.

Issues With Staying Connected

- If you are having issues with Percipio or Skillport with being disconnected from the session, please contact Customer Support directly <https://support.skillsoft.com/bootcamps> for assistance.
- There is no need to notify us during the session that you have rejoined the session after being disconnected or that you have missed time. These messages will be dismissed if you have no question.
- If being disconnected is a regular occurrence, please ask for the Zoom details in the session through the Q&A so you can join directly through Zoom. These details are the same for all the sessions. So please make note of them in a file so you only need to ask once.
- Review the instructions in the **PMP Bootcamp 5-Day and 8-Day Attendance Tracker and Certificate Request Process.docx** file to track each time you join and leave the session for whatever reason.

IS LIVE ATTENDANCE REQUIRED?

- YES, if you are taking this training to register for the PMP exam live attendance is required. However, this is the exception rule for the 8 Day Bootcamp – You are allowed to miss up to two sessions if you make up the sessions by watching their replays.
- If you miss more than 15 mins at any time (including during breaks) beyond the two sessions allowed, you will need to make it/them up by attending the live session(s) in a different 8-day cohort*.
- Check your Bootcamp documents for the PMP Bootcamp 5-Day and 8-Day Attendance Tracker and Certificate Request Process file that explains manually tracking your attendance and how to get your PDU Certificate.
 - *Please see the Bootcamp calendar at <http://calendar.skillsoft.com/> for information about upcoming sessions.



IN CASE OF ABSENCE

You can access a replay online for a previous session by following these steps 24 to 48 hours after the session ends.

Step 1. Go to: <https://github.com/Skillsoft-Content/PMPReplay>

Step 2. Click on the PMP Replay Zoom Links file for the year you attended the Bootcamp. And then click the Download option.

Step 3. When the file opens, and you are prompted enter the following password. Those are zero's not the letter O. The password is case sensitive.

pmpB00tcampReplay!

Step 4. Locate the worksheet that corresponds with the Cohort you attended and use the provided link and passcode on the worksheet for the replay.

Note: The password to open the Excel file is NOT the passcode to access the replay.

***Replays will be available for 1 year. They are not available for download.**

NO LIMIT FOR REPLAYS:

For the Bootcamp you are attending, there is no limit on requesting the replays for study purposes.

Attendance Video

Video in Percipio: PMP 5 Day and 8 Day Attendance (9:25 approx. run time)

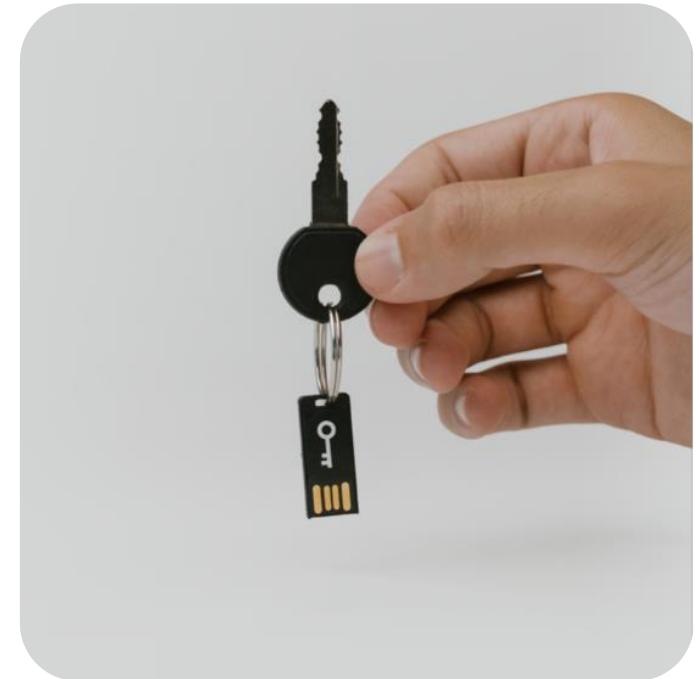
Video in GitHub: PMP 5 Day and 8 Day Attendance (9:16 run time)

PMP ATP Attendance 5-Day and 8-Day



PMP® Learner Kit

- Please note that each PMP student must have their own Learner Kit.
- The Learner Kit vouchers must be purchased through Skillsoft and redeemed through PMI. Please contact your corporate training staff for more information.



► **Questions? Watch the 5-minute Information Video**
(available in Percipio and GitHub)

PMP Learner Kit Video

[Video in Percipio: PMP ATP Learner Kit Information \(5:16 run time\)](#)

[Video in GitHub: PMP ATP Learner Kit Information \(5:07 run time\)](#)

PMP ATP Learner Kit Information

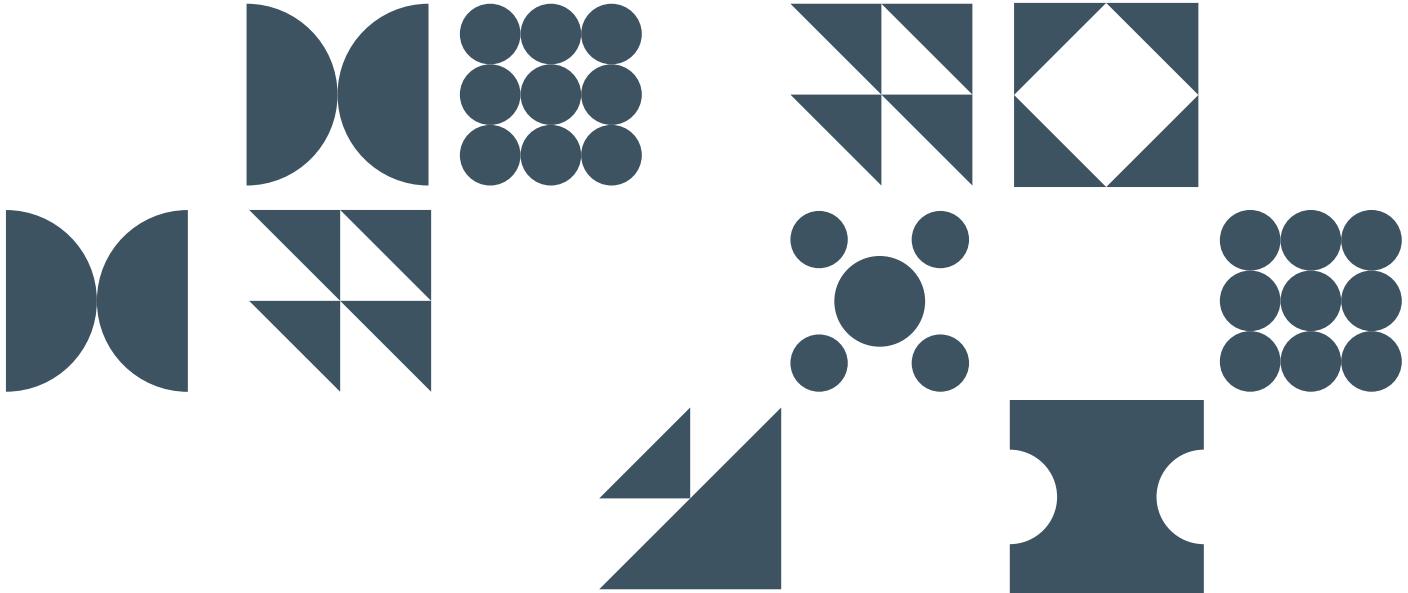




PMI® AUTHORIZED PMP® EXAM PREP COURSE

Version 3.0 | 2023 Release





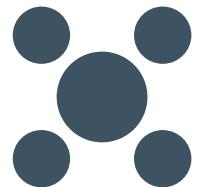
Welcome

Thank you for joining the PMI[®] Authorized PMP[®] Exam Prep course.

If you've earned your CAPM[®] certification with us, welcome back!

Or if you're coming from another project management background, certification or work experience, we are pleased to welcome you to PMI's community of learning.

We are proud of our 50-year history of peer-to-peer learning and membership and wish you the best of luck as you undertake your PMP[®] exam preparations.



You, Getting Certified

- Four-year degree
- 36 months leading projects
- 35 hours of project management education/training or CAPM® certification

— OR —

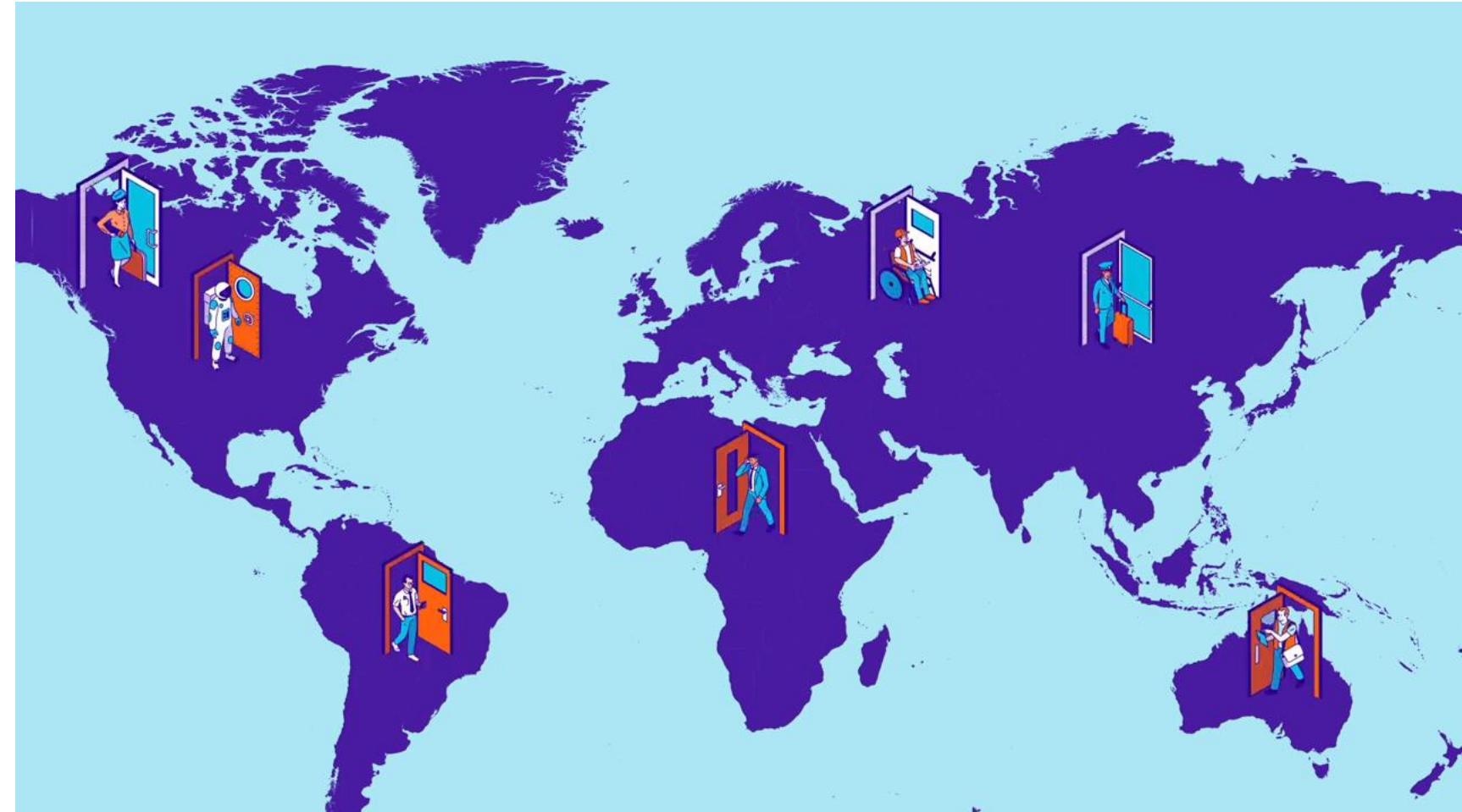
- A high school diploma or an associate's degree (or global equivalent)
- 60 months leading projects
- 35 hours of project management education/training or CAPM® certification



The Project Economy

The Project Economy backs the most important work all over the world.

No matter where you are, learning our core principles means you have a guided, lifetime practice in project management.



The PMP® Exam

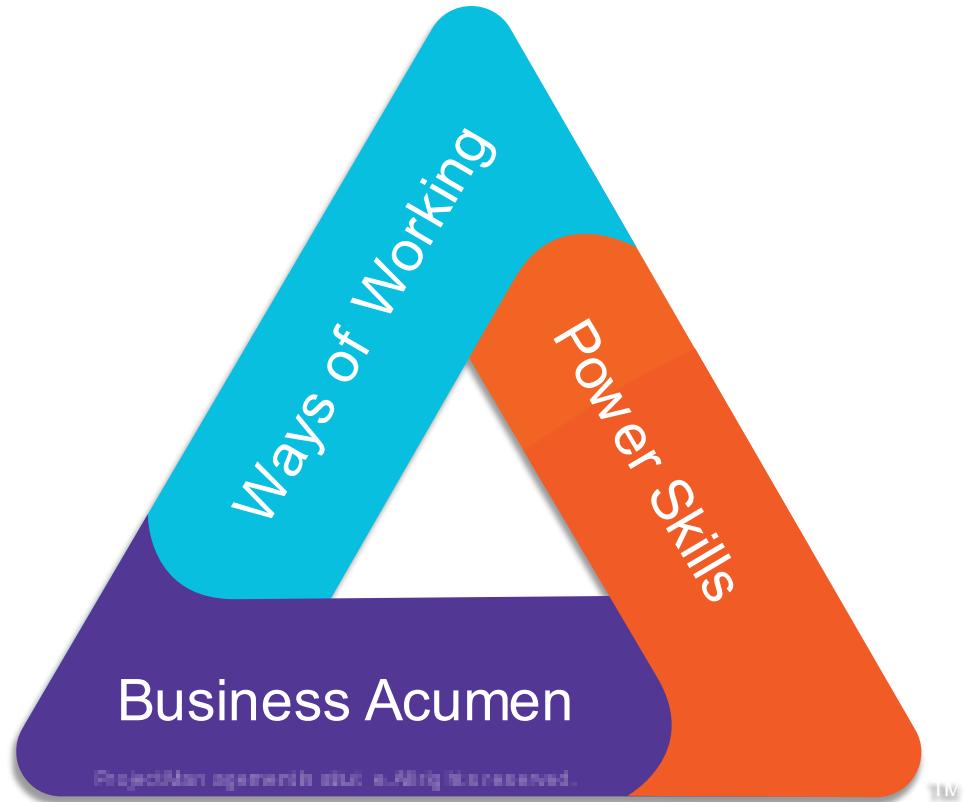
The PMP® exam includes content that spans the value delivery spectrum, including **predictive**, **adaptive** and **hybrid** approaches. It was updated in 2021 to reflect the fuller complement of skills and approaches found in our dynamic and global profession.

Just like the sides of the PMI Talent Triangle®, we focus on three performance domains in project management:

People | Power Skills – 42%

Process | Ways of Working – 50%

Business Environment | Business Acumen – 8%



Learning Topics



The learning topics in this training come directly from the PMP® exam content outline (ECO). The ECO is the basis for the PMP® exam.

The relevant ECO content appears at the end of each topic, for your reference.

The ECO was created by a global selection of PMI members who hold the PMP® certification and work in diverse industries. It includes what they think you need to know to do the job, including experience and broader business concepts.

PMP® EXAM CONTENT OUTLINE (ECO)

- PMP® Exam Content Outline is the *syllabus* of the PMP exam.
- Context is important!

TIP: Print the PMP Exam Content Outline and identify your **STRENGTHS, AREAS OF IMPROVEMENT AND WEAKNESSES**

Domain I		People—42%
Task 1	Manage conflict	<ul style="list-style-type: none">• Interpret the source and stage of the conflict• Analyze the context for the conflict• Evaluate/recommend/reconcile the appropriate conflict resolution solution
Task 2	Lead a team	<ul style="list-style-type: none">• Set a clear vision and mission• Support diversity and inclusion (e.g., behavior types, thought process)• Value servant leadership (e.g., relate the tenets of servant leadership to the team)• Determine an appropriate leadership style (e.g., directive, collaborative)• Inspire, motivate, and influence team members/stakeholders (e.g., team contract, social contract, reward system)• Analyze team members and stakeholders' influence• Distinguish various options to lead various team members and stakeholders
Task 3	Support team performance	<ul style="list-style-type: none">• Appraise team member performance against key performance indicators• Support and recognize team member growth and development• Determine appropriate feedback approach• Verify performance improvements
Task 4	Empower team members and stakeholders	<ul style="list-style-type: none">• Organize around team strengths• Support team task accountability• Evaluate demonstration of task accountability• Determine and bestow level(s) of decision-making authority

REFERENCE LIST

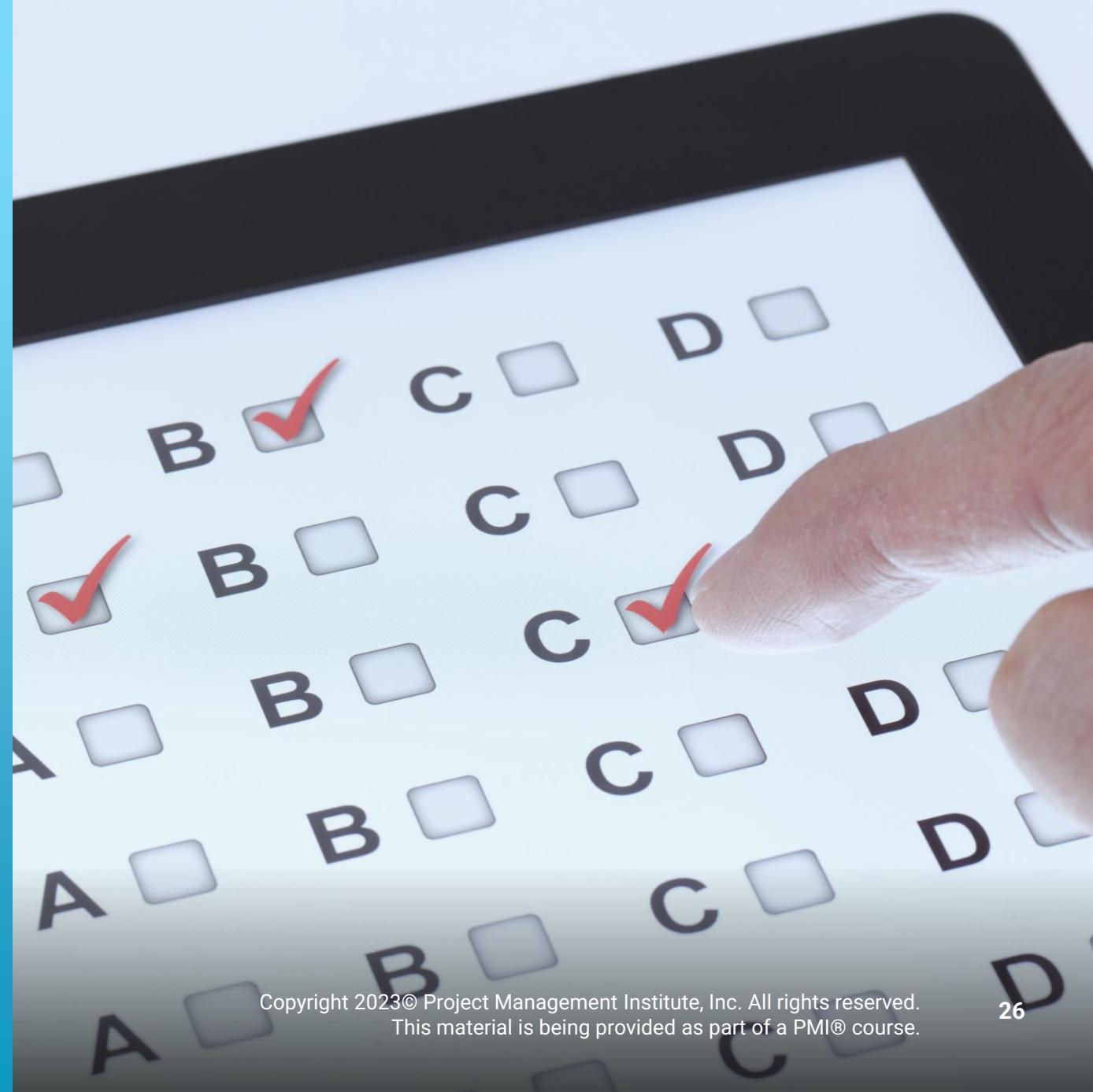
This list represents over 5,000 pages of reading! We will distill this information to include only what the learner needs to know. That is the value of working with an Authorized Training Partner.

The Project Management Institute states that, “it should also be noted that the references identified herewith are but one element of a broader set of educational resources and texts that might possibly be utilized for exam and study preparation”.

Book	Author
Agile Practice Guide	Project Management Institute
A Guide to the Project Management Body of Knowledge (PMBOK® Guide, 6th and 7th edition)	Project Management Institute
Project Management: A Systems Approach to Planning, Scheduling, and Controlling	Harold Kerzner
Effective Project Management: Traditional, Agile, Extreme, Hybrid	Robert K. Wysocki
Fundamentals of Technology Project Management, 2nd Edition	Colleen Garton, with Erika McCulloch
Project Managers Portable Handbook, 3rd Edition	David Cleland and Lewis Ireland
Information Technology Project Management, 7th Edition	Kathy Schwalbe
Essential Scrum: A Practical Guide to the Most Popular Agile Process	Kenneth S. Rubin
Project Management: The Managerial Process	Erik Larson
The Project Management Tool Kit: 100 Tips and Techniques for Getting the Job Done Right	Tom Kendrick

The PMP® Exam Format

- 180 questions
- 230 minutes to complete the exam
- Two optional 10-minute breaks for computer-based (online-proctored) tests, including center-based tests; paper-based exams have no breaks
- Questions are multiple-choice, multiple response, matching, hotspot and fill-in-the-blank



EXAM PREPARATION

For complete exam information, visit the

Project Management Institute at pmi.org

- Exam prerequisites
- Exam content outline
- Handbook



BEST LEARNING OUTCOMES

Bootcamp,
Percipio, &
Exam Simulator

**Successful candidates spend 80-100 hours
preparing for the exam**

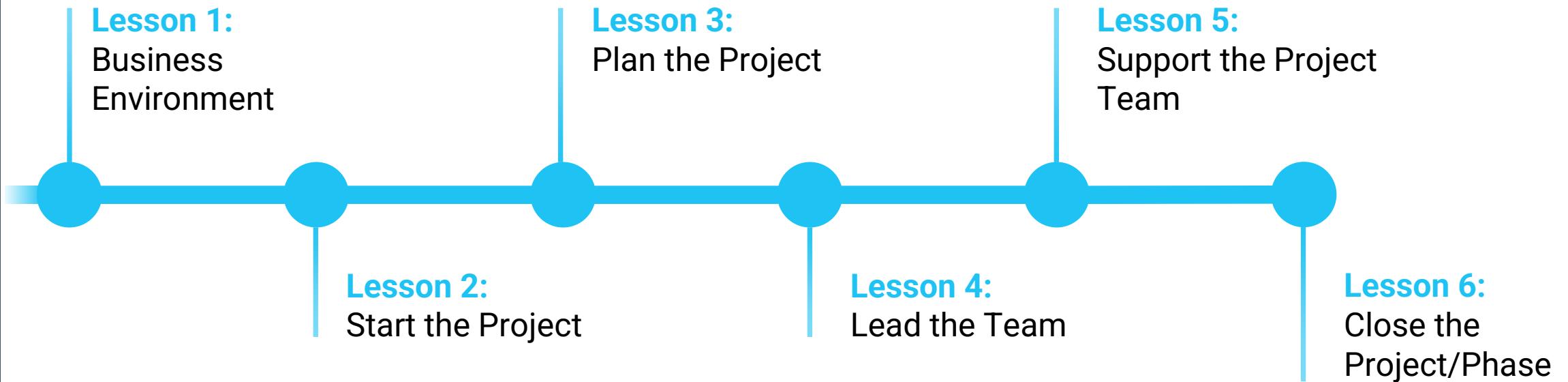
**Bootcamp
35 hours**

any order

**Percipio
“PMI 2021 Update”
35 courses**

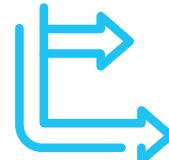
**TestPrep
Use as much as you want**

Contents



About This Course

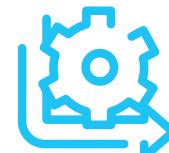
- **Life cycle icons:** To help highlight and differentiate concepts typical or unique to a certain life cycle, we use the corresponding icon:



Predictive



Adaptive



Hybrid

- **Other icons**



Important



Interactive



Use Expert Judgment



Tools / Techniques



Question



Discussion



Note

- **Project management terminology:** A course glossary is included as a PDF file. Your instructor may show definitions from the glossary on slides during the course.

Example: Project Management

Defined words are **colored** or
an asterisk (*) is placed next
to them.

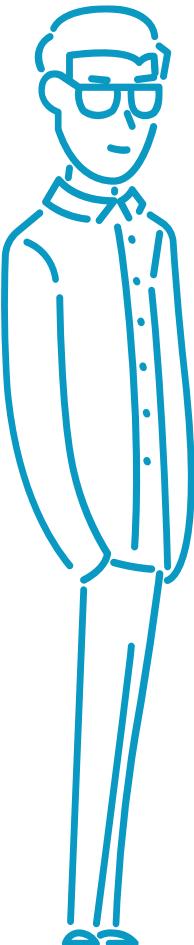
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This material is being provided as part of a PMI[®] course.

Definition Slider



Project Case Study:

Student Resource



SHAWPE
— INDUSTRIES —

Meet our **project manager, Ang Fen** and interact with him, the project team and stakeholders!

This is an immersive, fictional scenario of a hybrid project which includes review and reinforcement of project management concepts and practice exam questions.

Shawpe Lifestyle Centre (SLC) Project



The project team will develop and build a “lifestyle centre” in the historic Oasestown district, including design and occupancy of retail and community spaces

- Funding partner: Oasestown Municipality
- Development partner: Oases Architects
- US \$7 million initial capital budget
- 36-month timeline



Mapping this course to the Student Workbook

	Business Environment Lesson 1	Start the Project Lesson 2	Plan the Project Lesson 3	Lead the Project Team Lesson 4	Support Project Team Performance Lesson 5	Close the Project/Phase Lesson 6
Topic A	(1A) Foundation	(2A) Identify and Engage Stakeholders	(3A) Planning Projects	(4A) Craft Your Leadership Skills	(5A) Implement Ongoing Improvements	(6A) Project Phase/Closure
Topic B	(1B) Strategic Alignment	(2B) Form the Team	(3B) Scope	(4B) Create a Collaborative Project Team Environment	(5B) Support Performance	(6B) Benefits Realization
Topic C	(1C) Project Benefits and Value	(2C) Build Shared Understanding	(3C) Schedule	(4C) Empower the Team	(5C) Evaluate Project Progress	(6C) Knowledge Transfer
Topic D	(1D) Organizational Culture and Change Management	(2D) Project Approach	(3D) Resources	(4D) Support Team Member Performance	(5D) Manage Project Issues and Impediments	
Topic E	(1E) Project Governance		(3E) Budget	(4E) Communicate and Collaborate with Stakeholders	(5E) Manage Project Changes	
Topic F	(1F) Project Compliance		(3F) Risks	(4F) Training, Coaching and Mentoring		
Topic G			(3G) Quality	(4G) Manage Conflict		
Topic H			(3H) Integrate Plans			

Let's Get to Work!



LESSON 1

BUSINESS ENVIRONMENT

- Foundation
- Strategic Alignment
- Project Benefits and Value
- Organizational Culture and Change Management
- Project Governance
- Project Compliance



Learning Objectives

- Define 'project' and how it relates to the larger discussion of project management.
 - Discuss the different types of organizational structures and how they relate to your project's management.
 - Discuss the principles of project management.
 - Discuss the principles of agile and how they relate to your project's management.
- Discuss strategic alignment and its elements.
 - Explain the impact of business factors on strategic alignment.
 - Determine how projects align with business strategy.
- Identify types of business value.
- Describe change management theory and its relation to organizational change.
- Define and discuss project governance.
- Explain project compliance and its importance.



Foundation

TOPIC A

A project:

- Creates a unique product, service or result
- Is time-limited
- Drives change
- Enables value creation for a business or organization

Project success depends on:

- Organizational project maturity
- Project manager effectiveness
- Funding and resource availability
- Team member skill levels
- Collaboration and communication within the team and with key stakeholders
- Understanding of the core problem and related needs

The Evolution of Project Management



Can you describe, in your own words, how project management has changed during this time?



ca. 1969 – PMI founded

The application of knowledge, skills, tools and techniques to project activities to meet the project requirements

2022 - Toward a systems view

“Projects do not simply produce outputs, but more importantly, enable those outputs to drive **outcomes** that ultimately deliver value to the organization and its stakeholders.”

- PMBOK® Guide - Seventh edition

Project Management Life Cycles and Development Approaches

Description	Key Roles	Value Delivery Proposition
 Plan-based approach: <ul style="list-style-type: none">Activities completed in a distinct or linear fashionNew phase begins only when the previous phase is completed	<ul style="list-style-type: none">Project sponsor authorizes projectTeam led by project manager	<ul style="list-style-type: none">Deliverables transitioned to customer at completionValue realized in both short and long term
 Change-based approach: <ul style="list-style-type: none">Agile, incremental or iterative developmentTimeboxed cadence (iterations/sprints) or continuous flow	<ul style="list-style-type: none">Product owner controls value propositionProject team delivers workProcess roles include team lead, scrum master, agile coach, facilitator	<ul style="list-style-type: none">Iterative or incremental delivery to customer during life cycleRegular customer feedback cycle enables continuous development of value toward a "final" product
	Any combination of the above	

Project Management Office (PMO)*



Many large and established project-oriented organizations have a PMO, but PMOs are not a requirement for project management practice.

PMOs can be:

Supportive

- Develop best practices, methodologies, standards and templates
- Coach, mentor, train, guide project managers

Controlling

- Monitor compliance with project management standards, policies, procedures and templates via project audits

Directive

- Manage shared resources
- Coordinate communication across projects

Agile Centers of Excellence (ACoEs)

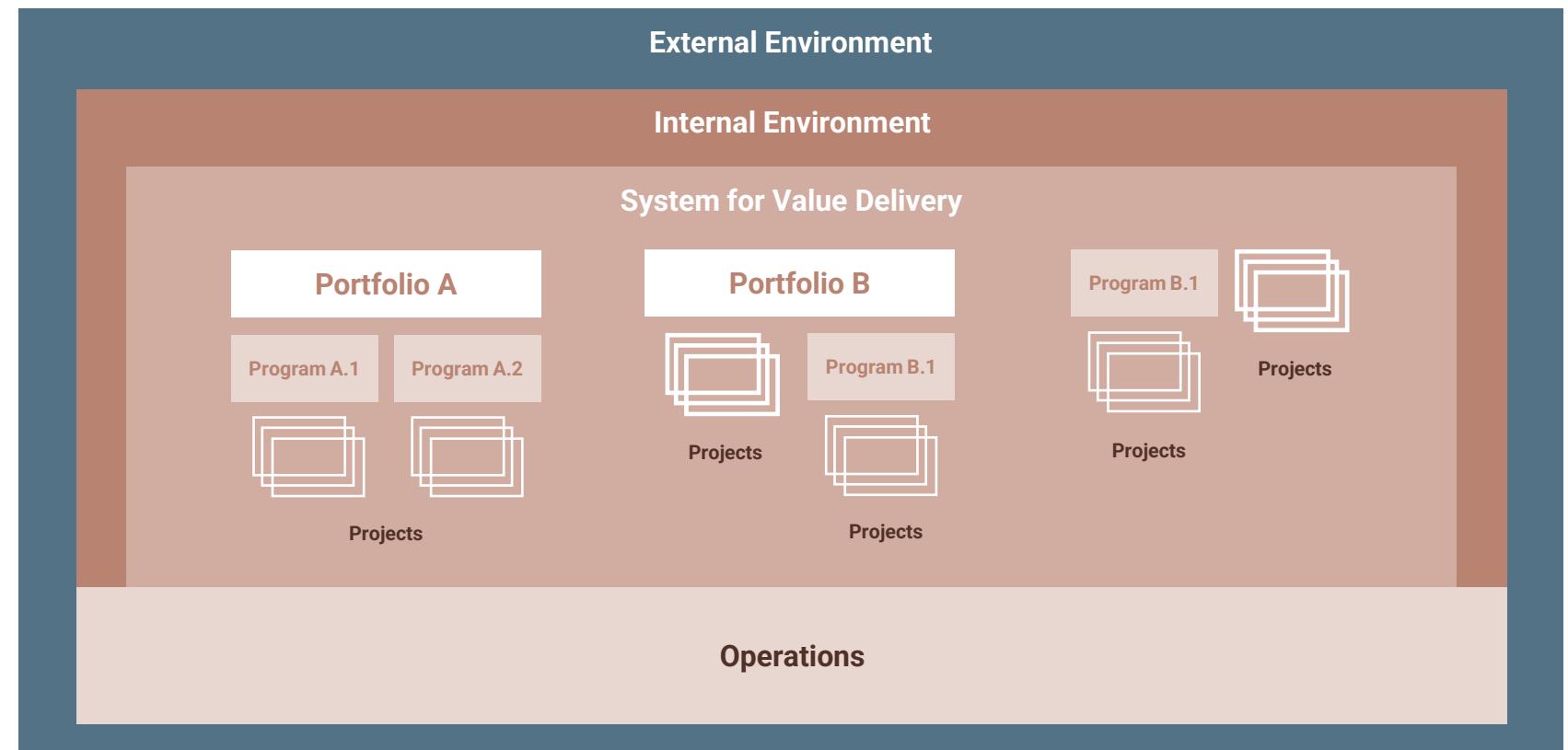
aka *Value Delivery Office (VDO)*

ACoEs enable, rather than manage, project efforts:

- Coach teams
- Build agile mindset, skills and capabilities throughout the organization
- Mentor sponsors and product owners

OPM: A System for Value Delivery

Organizational project management (OPM) – strategy execution framework that coordinates project, program, portfolio and operations management, and which enables organizations to deliver on strategy



Projects, Programs, Portfolios

Portfolio Management

Collection of projects, programs, subsidiary portfolios and operations managed in a group to achieve strategic objectives

Aligns with business strategies

Program Management

Group of related projects, subsidiary programs and program activities managed in a coordinated manner to obtain benefits not available from managing them individually

Controls components and interdependencies to realize benefits

Project Management

Part of a broader program, portfolio or both

Enables achievement of organizational goals and objectives

Organizational Structures

- Functional
- Matrix
- Project-oriented
- Composite

Organizational structure and governance affects/determines:

- How organizational groups and individuals interrelate
- How much authority the project manager has
- What resources will be available
- How the project will be conducted

Relative Authority in Organizational Structures

	Functional	Matrix	Project-oriented
Team member loyalty	Functional department	Conflicted loyalty	Project
Team member reporting	Functional manager	Both functional manager and project manager	Project manager
Project manager role	Seldom identified	Coordinator to full project manager	Full-time and responsible
Team member role	Part-time on project	Part-time on project	Full-time on project (preferred)
Control of project manager over team members	Nonexistent (functional manager controls)	Medium – shared with functional manager/sponsor	High

Interactive/Activity



Think of your current or a recent project. Can you identify the organizational structure type and describe how it affects your project in the following ways?

- How organizational groups and individuals **interrelate**
- The project manager's authority
- **Resource** availability
- How the project is **conducted**



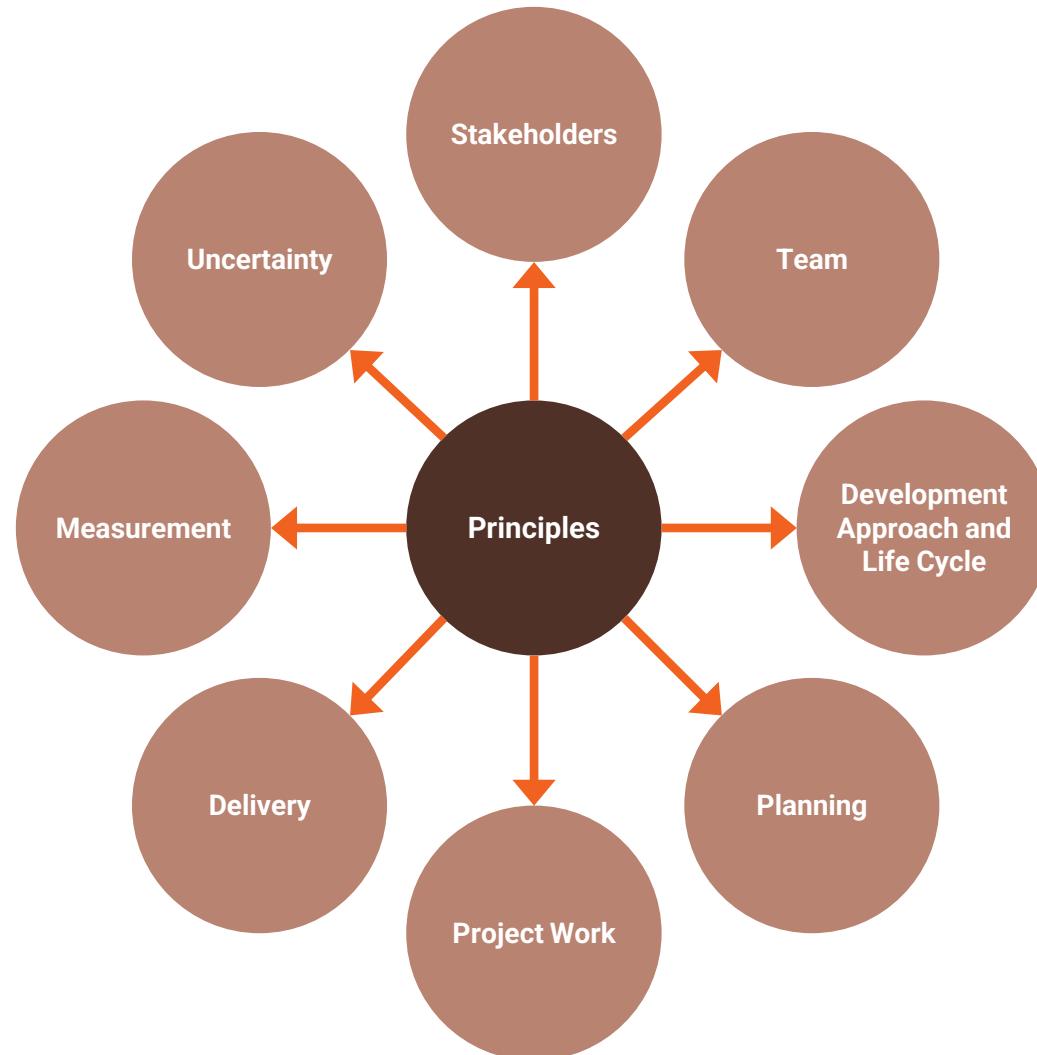
Project Management Principles

Guidance for All Project Practitioners

-
- a. Be a diligent, respectful and caring steward
 - b. Recognize, evaluate and respond to system interactions
 - c. Navigate complexity
 - d. Create a collaborative project team environment
 - e. Demonstrate leadership behaviors
 - f. Optimize risk responses
 - g. Effectively engage with stakeholders
 - h. Tailor based on context
 - i. Embrace adaptability and resiliency
 - j. Focus on value
 - k. Build quality into processes and deliverables
 - l. Enable change to achieve the envisioned future state

From Principles to Performance Domains

Use the 12 principles to guide behavior in the 8 project performance domains



Agile

Derived from:

- Four values from the Agile Manifesto
- 12 principles



There are more than 50 known agile practices and methods in use!



The Agile Manifesto for Software Development

“We are uncovering better ways of developing software by doing it and helping others do it.

Through this work we have come to value:

Individuals and interaction	over	Process and tools
Working software	over	Comprehensive documentation
Customer collaboration	over	Contract negotiation
Responding to change	over	Following a plan

That is, while there is value in the items on the right, we value the items on the left more.”

-2001

Principles Behind the Agile Manifesto

1 to 6

1. Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.
2. Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage.
3. Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale.
4. Businesspeople and developers must work together daily throughout the project.
5. Build projects around motivated individuals. Give them the environment and support they need and trust them to get the job done.
6. The most efficient and effective method of conveying information to and within a development team is face-to-face conversation.

Principles Behind the Agile Manifesto

7 to 12

7. Working software is the primary measure of progress.
8. Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely.
9. Continuous attention to technical excellence and good design enhances agility.
10. Simplicity – the art of maximizing the amount of work not done – is essential.
11. The best architectures, requirements, and designs emerge from self-organizing teams.
12. At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly.

Agile:

The “Far Side” of Adaptive Approaches



“Doing Agile vs. Being Agile”

Agile means:

- Iterations are likely to be shorter
- Product is more likely to evolve based on stakeholder feedback

Still used for software development, and agile principles have been applied to other kinds of development projects, vis-à-vis *the agile mindset*.

- Adopt a flexible, change-friendly way of thinking and behaving
- Understand the purpose of these practices
- Select and implement appropriate practices based on context
- Internalize agile values, mindset and behavior

Tailor* Projects to Contexts

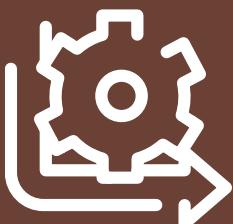


Because each project is unique, we adapt methods to the unique project context to determine the most appropriate ways of working to produce the desired outcomes.



Tailor iteratively and continuously throughout the project

Tailor Hybrid Approaches, Processes, Practices and Methods



Apply product knowledge, delivery cadence and awareness of the available options to select the most **appropriate development approach**

Tailor **processes** for the selected life cycle and development approach; include determining which portions or elements should be added, modified, removed, blended, and/or aligned

Tailor **practices and methods** to the environment and culture

Topics Covered

- Foundational project management concepts
- Project management principles
- The Agile mindset
- Tailoring – hybrid approaches, processes and practices in project management

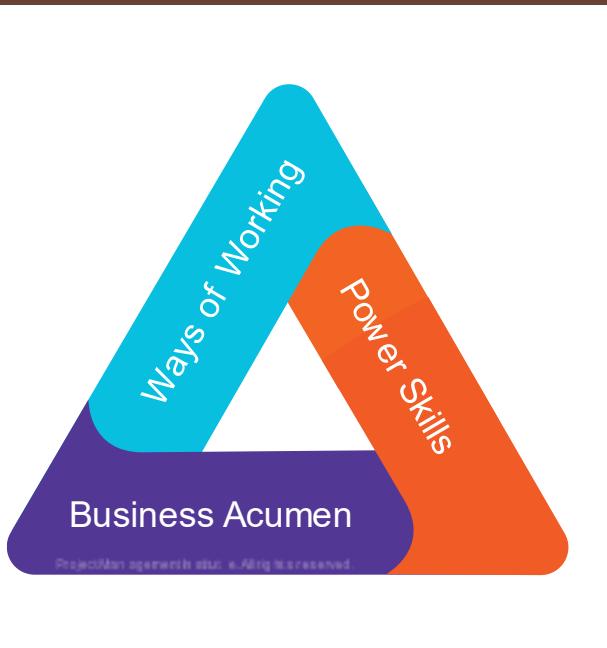




Strategic Alignment

TOPIC B

PMI Talent Triangle®



The PMI Talent Triangle® reflects the skills needed by today's project professionals and changemakers as they navigate the evolving world of project management.

Ways of Working

Mastering diverse and creative ways (predictive, adaptive, design thinking) to get any job done

Power Skills

The critical interpersonal skills required to apply influence, inspire change and build relationships

Business Acumen

Effective decision-making and understanding of how projects align with the big picture of broader organizational strategy and global trends

Strategic Alignment and Business Management Skills

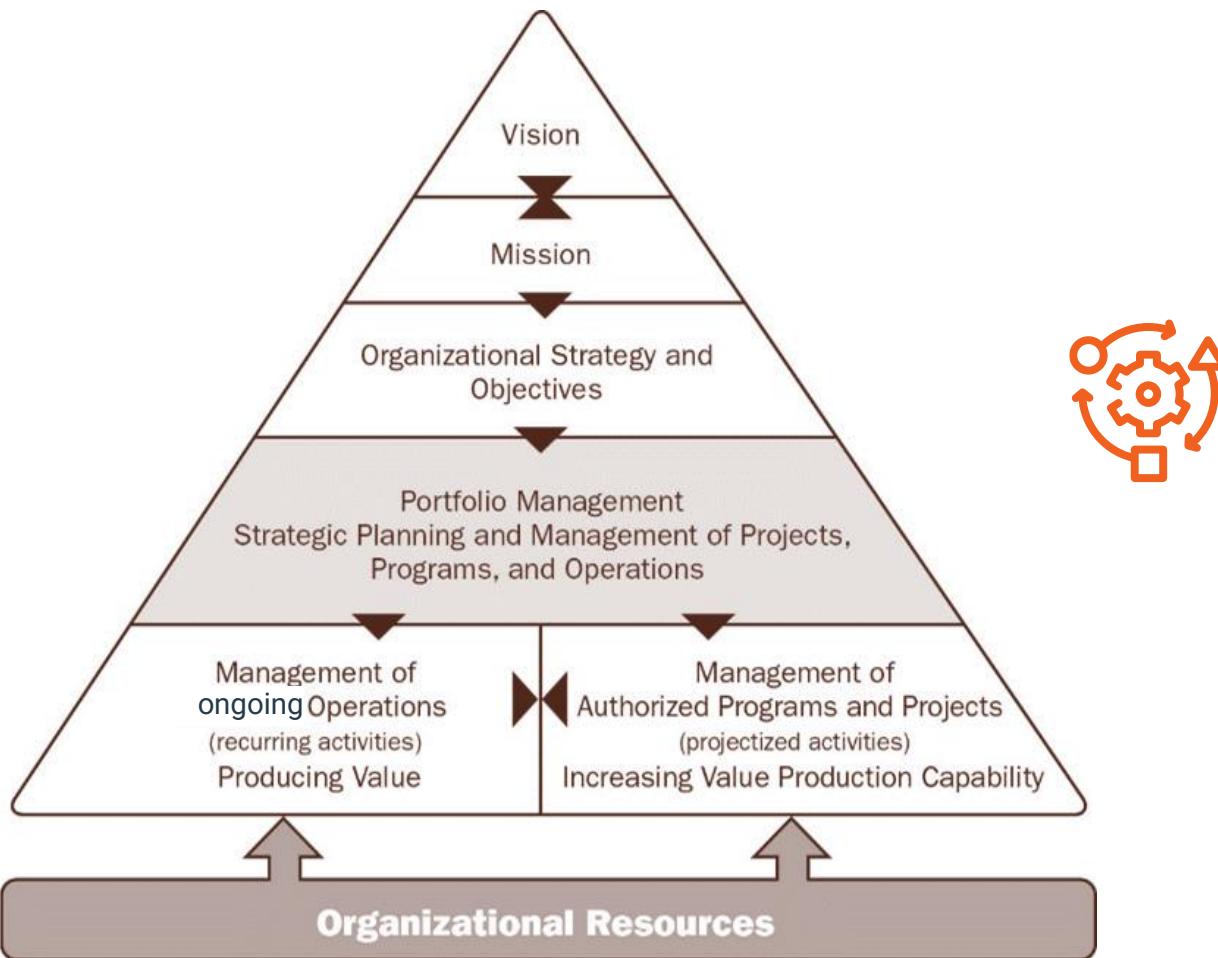
Do you:

- Know your organization's **strategic plan**?
- Understand how project goals matter to an organization's long-term vision and mission?
- See a high-level overview of the organization?
- Have a working knowledge of business functions?
- Have pertinent product and industry expertise?

Can you:

- Explain the essential business aspects of a project?
- Work with SMEs and a sponsor to develop an appropriate project delivery strategy?
- Implement strategy to maximize the business value of project?

Strategic Management Elements and Frameworks



Some agile projects use a goal-setting framework such as OKRs (Objectives and Key Results) that describes the organization's objectives and desired key results.

Note: From PMI's *Standard for Portfolio Management*

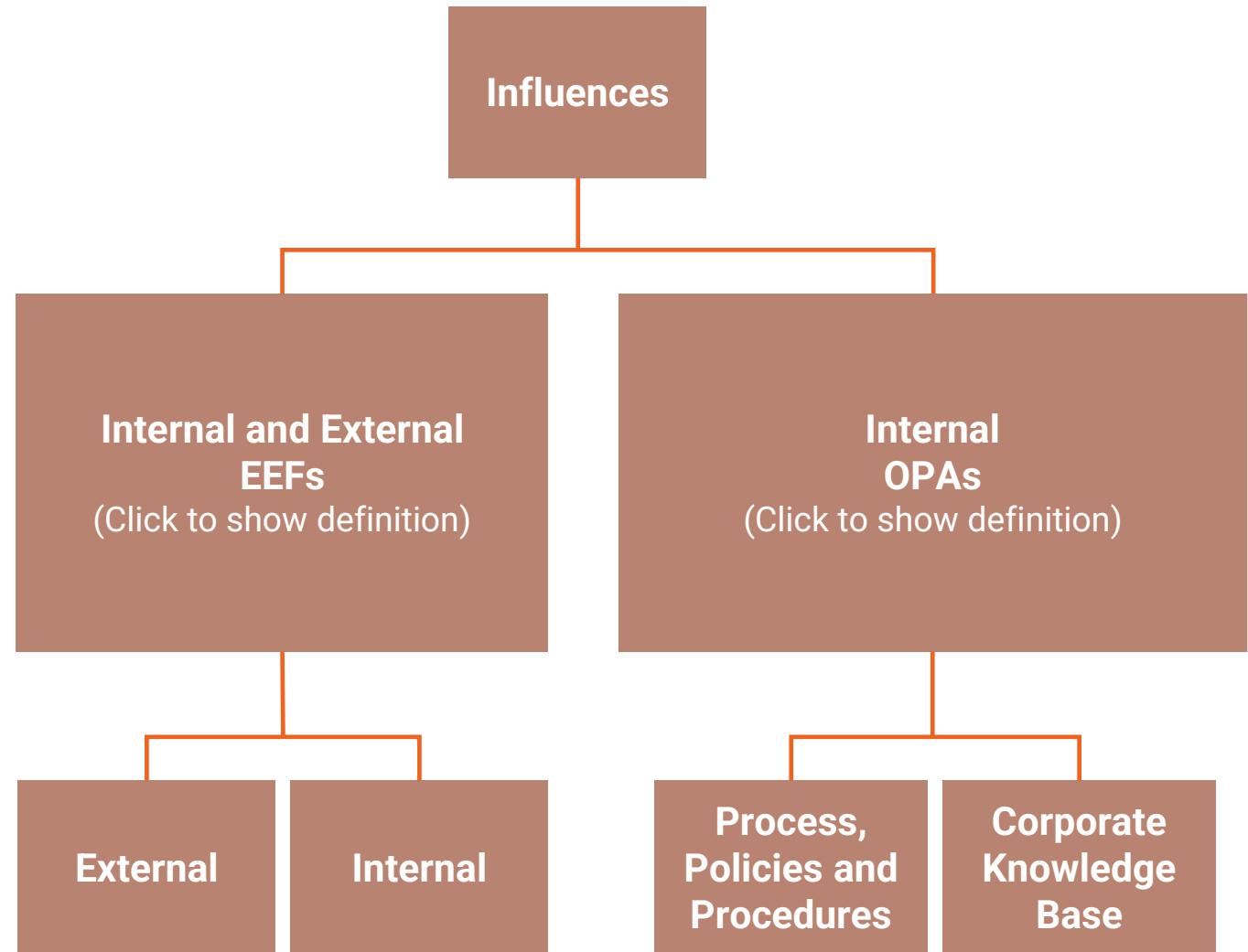
Organizational Influences

Enterprise Environmental Factors (EEFs)

- Internal and external to the organization

Organizational Process Assets (OPAs)

- Project policies, procedures and templates
- Historical project information



Get to Know the External Business Environment



Use frameworks or prompts to understand external factors that can introduce risk, uncertainty, or provide opportunities and affect the value and desired outcomes of a project:

- **PESTLE:** Political, economic, socio-cultural, technical, legal, environmental
- **TECOP:** Technical, environmental, commercial, operational, political
- **VUCA:** Volatility, uncertainty, complexity, ambiguity

In addition, review:

- Comparative advantage analysis
- Feasibility studies
- SWOT (strengths, weaknesses, opportunities and threats) analysis
- Assumption analysis
- Historical information analysis
- Risk alignment with organizational strategy

Internal Business Environment Factors

- **Organizational changes** can dramatically impact **scope**
- The **project manager, project sponsor or product owner** need to be familiar with business plans, reorganizations, process changes and other internal activities
- Internal business changes might cause:
 - Need for new deliverables
 - Reprioritization of value, including removal of existing deliverables



OPAs

Processes, policies and procedures

Examples—

- Organizational charts
- Procurement rules
- Hiring and onboarding procedures

Organizational knowledge bases

Examples—

- Engineering wikis
- Libraries or archives
- Lessons learned repositories

EEFs

Internal

Examples—

- Resource capabilities
- Organizational culture
- IT software
- Distribution of facilities

External

Examples—

- Marketplace conditions
- Laws, regulations and standards
- Operating conditions
- Social and cultural influences

Activity:

Identify OPAs and EEFs



Project name: Shawpe Lifestyle Centre

List of EEFs and OPAs:

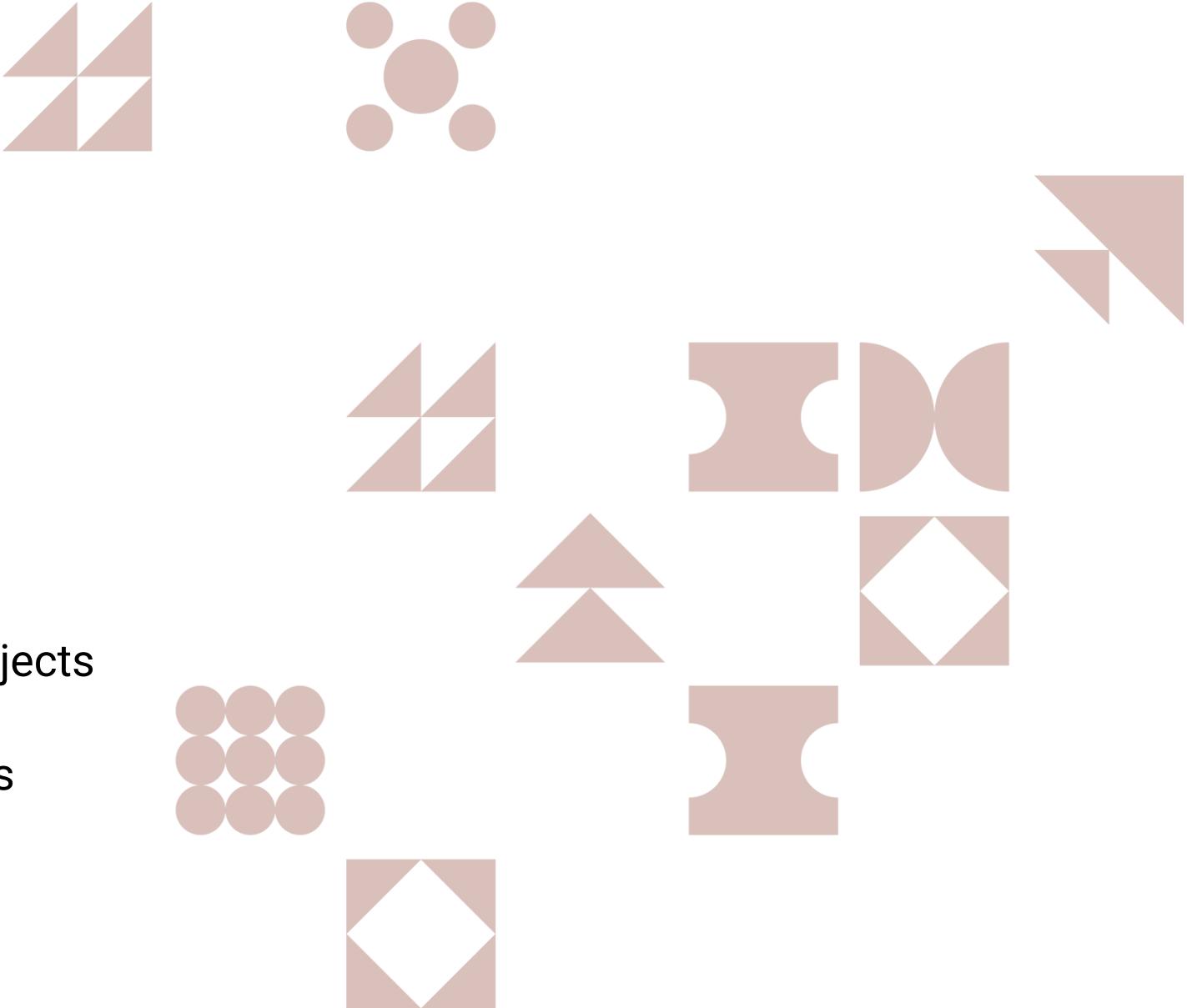
- a. Economic demand for a new shopping area
- b. Historical society (conservation) building regulations
- c. Local neighborhood demand for a better town center
- d. Archive of past large infrastructure projects
- e. Approved vendor and contractors list
- f. Tenant selection process



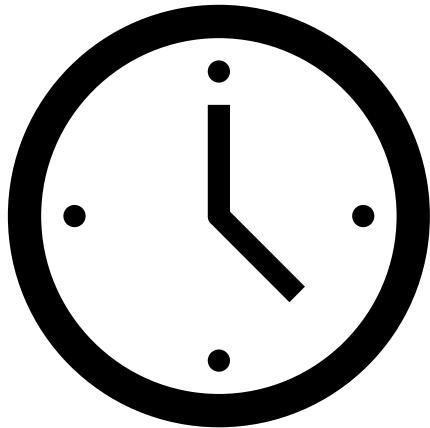
Which are EEFs? Which are OPAs?

Topics Covered

- Define strategic alignment and business acumen
- Follow guidelines for effective business decision-making
- Explore organizational influences on projects
- Explain how projects align with broader organizational strategy and global trends



1-Hour Break!



**See you back after one
hour!**



Project Benefits and Value

TOPIC C

Business Value

- The net quantifiable benefit (tangible and/or intangible) identified from a business endeavor
- Part of the objectives or description of the project in the initiating agreements
- Benefits realization is based on declared business value



Examine Business Value

- Communicate with stakeholders, do the research and use expert knowledge
- Examine, evaluate and confirm to determine exactly what is *or can be* of value!

Look especially at:

- Shareholder value (publicly traded companies) or business growth (private)
- Customer value
- Employee knowledge
- Channel or business partner value

Types of Business Value



**Financial
Gain**



**New
Customers**



**Social
Benefit**



**First to
Market**



Improvement
*Technological,
process, etc.*



Regularization
*Alignment or
compliance with
standards and
regulations*

Needs Assessment

Obtain Data for the Project

Note: From *Business Analysis for Practitioners: A Practice Guide*

- Usually performed by a **business analyst**
- Precedes the business case
- Involves understanding of:
 - Business goals and objectives
 - Issues and opportunities
- Recommends proposals to address:
 - What should be done
 - Constraints, assumptions, risks and dependencies
 - Success measures
 - Implementation approach

Business Documents

- Are developed prior to project start (usually by a business analyst or key project stakeholder)
- Contain information about the project's objectives and contribution to the business goals
- Help the business to determine whether a project is worth the required investment of time, money, and resources



Review the business documents periodically

Business Documents

Business Case and Benefits Management Plan



Business case: justifies project and establishes boundaries

- Cost-benefit analysis
- Business need
- Quality specifications
- Schedule or cost constraints



Acceptance of the business case usually leads to creation of the project charter.

Benefits management plan should include:

- Processes for creating, maximizing and sustaining project benefits
- Time frame for short- and long-term benefits realization
- Benefits owner or accountable person
- Metrics
- Assumptions, constraints and risks



This is a business document, not part of the project management plan.

Benefit Measurement Methods



Cost-benefit analysis: How businesses justify the selection (authorization) of a project

Business - “smaller is better”

- Estimate payback period – Smallest number (duration) chosen
- Assess **opportunity cost** – What if we didn’t undertake the project?

Financial - largest number (profit) chosen - “bigger is better”

- Time value of money
 - Present value (PV)
 - Future value (FV)
 - Net present value (NPV)
- **Internal rate of return (IRR)**
- **Return on investment (ROI)**



You will not need to calculate any of these for the exam.

Project Selection Using Present Value (PV) and Net Present Value (NPV)

PV applies to projects that span several time periods when the value of money might change – e.g., inflation

Factors to determine PV include:

- Future value
- Interest rate
- Number of periods

Net present value (NPV):

- Is used for capital budgeting
- Accounts for inflation and macro-economic change (discount rate)
- Compares the value of a currency unit today to the value of the same currency unit in the future

Year	0	1	2	3	4
Net Cash Flows	-1200	+400	+800	+600	+1200
Factor	1	.91	.83	.75	.68
Net Present Value	-1200	+364	+664	+450	+816

How OKRs Help Deliver Business Value

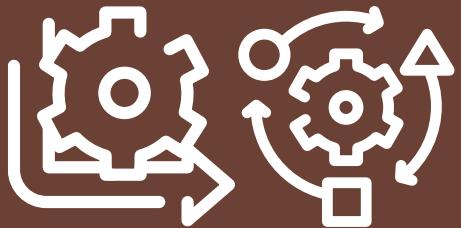


- Start with organizational objectives
- Decide key desired results
- Refine further with objectives and key results (OKRs):
 - Objectives are goals and intents
 - Key results are time-bound and measurable milestones under these goals and intents

OKR best practices:

- Support each objective with between 3-5 measurable key results
- Aim for 70% success rate to encourage competitive goal-making. A 100% success rate should be re-evaluated as not challenging enough
- Write OKRs that are action-oriented and inspirational and include concrete, measurable outcomes

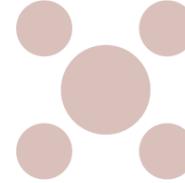
Incremental Value Delivery



An incremental development approach can:

- Enable value delivery sooner
- Attain higher customer value and increased market share
- Allow partial delivery (or previews) to customers
- Enable early feedback, allowing for adjustments to the direction, priorities and quality of the product

ECO Coverage

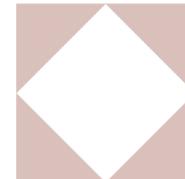
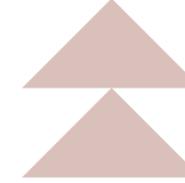
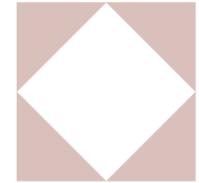
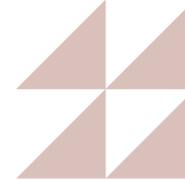
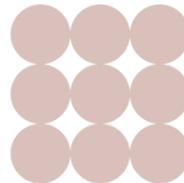


3.2 Evaluate and deliver project benefits and value

- Investigate that benefits are identified (3.2.1)
- Evaluate delivery options to deliver value (3.2.4)

2.1 Execute project with the urgency required to deliver business value

- Assess opportunities to deliver value incrementally (2.1.1)



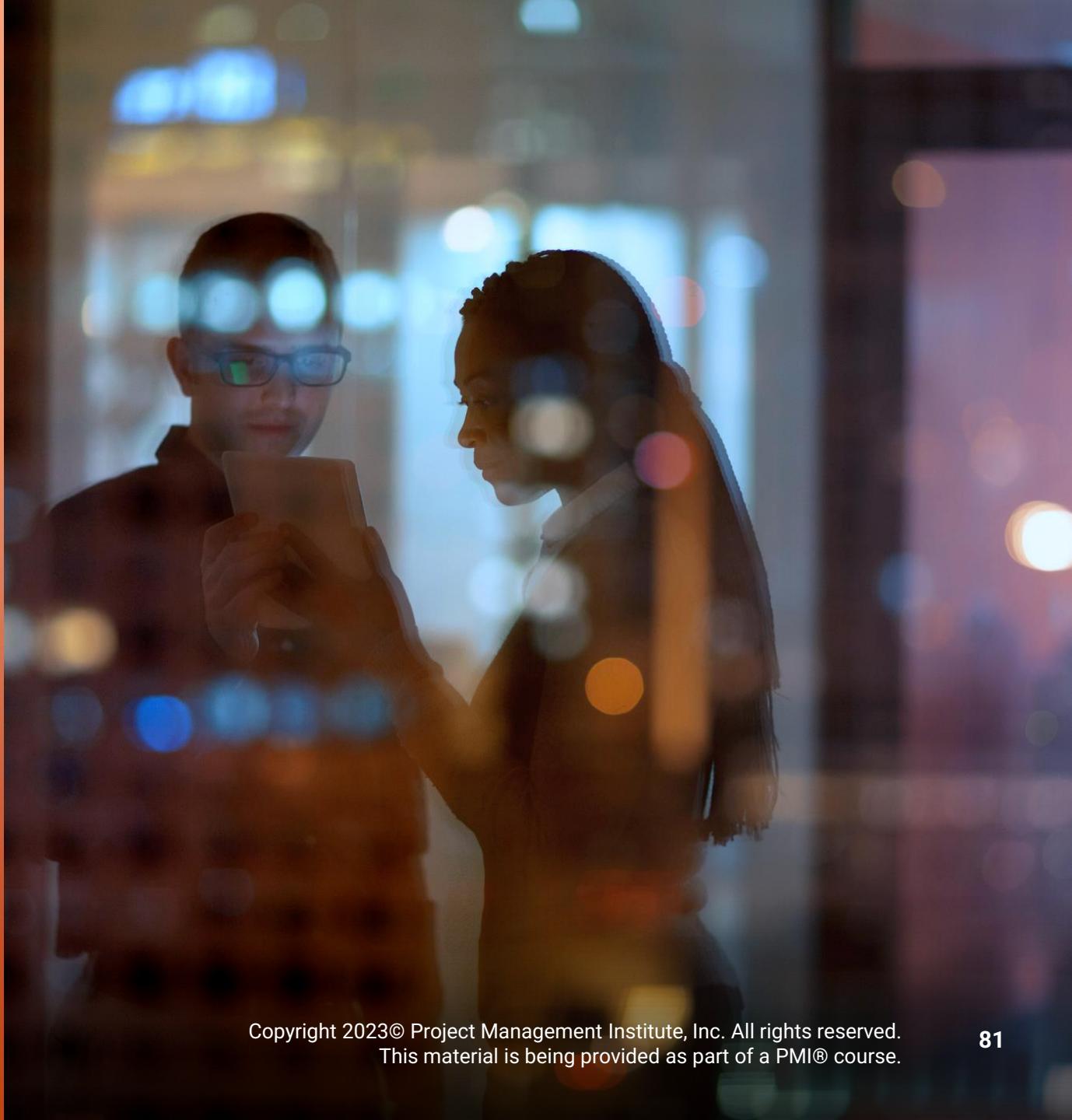


Organizational Culture and Change Management

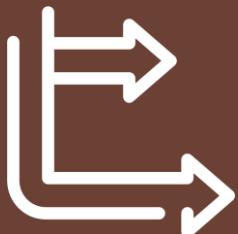
TOPIC D

Change Management*

- Organizations embrace change as a strategy.
- PMOs build and sustain alignment between projects and the organization.
- Whether your organization has a PMO or not, you are a “changemaker”!
 - Tailor a strategy to circumstances, people and timing
 - Use a robust approach



Manage Organizational Change Impacts on Projects



- **Assess** organizational culture
- **Evaluate** impact of organizational change to project and determine required actions
- **Recommend** options for changes to project
- Continually **monitor** external business environment for impacts to project scope/backlog

Get to Know Organizational Cultures and Styles

- View of leadership, hierarchy and authority
- Shared vision, beliefs and expectations
- Diversity, equity and inclusion practices
- Risk tolerance
- Regulations, policies and procedures
- Code of conduct
- Operating environments
- Motivation and reward systems



Risk, Culture and Change in Organizations



Risk threshold and appetite are shaped by diverse values of:

- Country/region
- Industry/sector
- Leadership
- Project team

These must be understood with care to:

- Establish effective approaches for initiating and planning projects
- Identify the accepted means for getting work done

Change Management Framework



“Organizational change requires individual change”

The **ADKAR®** model names five milestones an individual must achieve in order to change successfully:

- **A** – Awareness of the need for change
- **D** – Desire to support the change
- **K** – Knowledge of how to change
- **A** – Ability to demonstrate new skills and behaviors
- **R** – Reinforcement to make the change stick

Actions to Support Change



DO

- **Coach co-workers to support the business** – patience and compassionate mentoring are key
- **Enable an agile operating system** – Coach team members in agile to facilitate adoption of a change-centered mindset
- **Keep knowledge current** – Continuously improve processes and knowledge

DON'T

- **Force changes** – Involve and consult; aim to secure buy-in to the reasons for change
- **Alienate resisters** – Change can breed conflict, so proceed carefully

Plan for Change

Define the knowledge transfer, training and readiness activities required to implement the change brought by the project

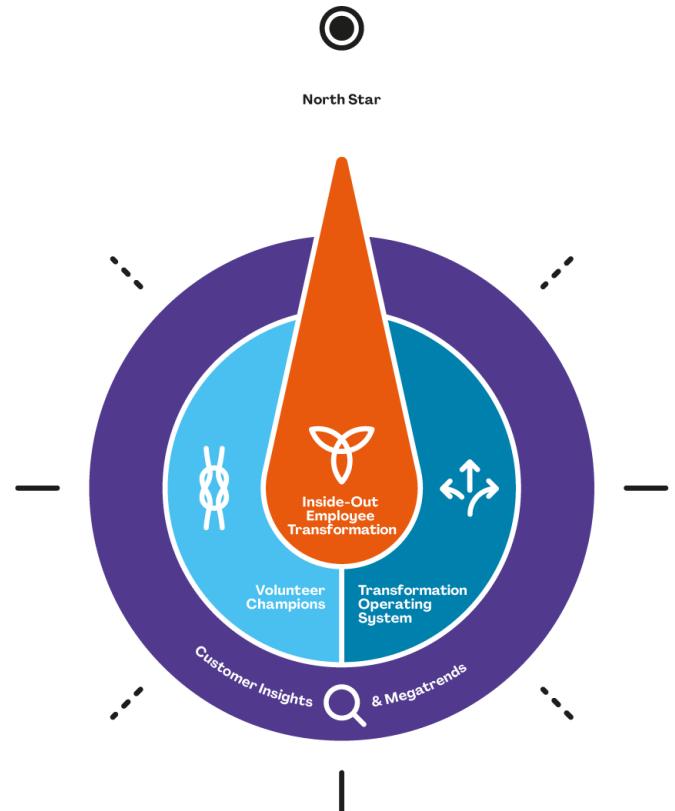
- Include an **attitudinal survey** to find out how people are feeling
- Create an **informational campaign** to familiarize people with changes
- Be open and transparent about potential effects of the changes
- Consider creating a rollout plan



The rollout plan is not a project management plan component.



Organizational Transformation for Project Practitioners



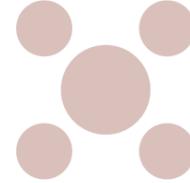
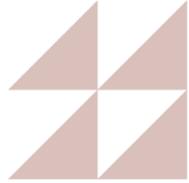
- A **North Star statement** articulates the vision and strategic objectives
- **Customer insights and global megatrends**
- A flat, adaptable cross-functional **transformation operating system**
- Internal **volunteer champions** (not external consultants)
- **Inside-Out Employee Transformation** (similar to ADKAR)



Brightline® - a PMI initiative

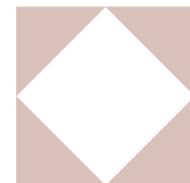
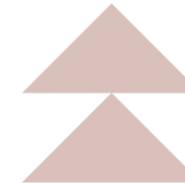
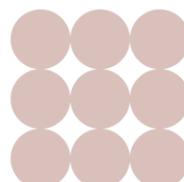
The Brightline Transformation Compass and five building blocks of transformation - an enterprise-level change management framework

ECO Coverage



3.4 Support organizational change

- Assess organizational culture (3.4.1)
- Evaluate impact of organization change to project, and determine required actions (3.4.2)
- Evaluate impact of the project to the organization and determine required actions (3.4.3)





Project Governance

TOPIC E

Project Governance

The framework, functions, and processes that guide project management activities to create a unique product, service, or result to meet organizational, strategic, and operational goals.

Key benefits:

- Offers a single point of accountability
- Encompasses the **project life cycle**

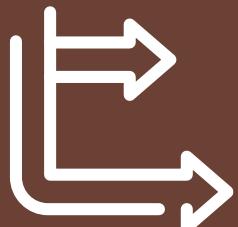


Governance type differs among organizations and projects.



Project Governance

What Kind and How Much?



Too much governance can annoy stakeholders, while relaxed governance can lead to a lack of stakeholder engagement or accountability.

Governance:

- Is typically already in place – established by a PMO or aligned with organizational policies
- Depends on strategic importance of project, constraints or oversight requirements



- *Critical for managing internal or external business environment change and deviations in budget, scope, schedule, resources or quality*
- *Budget management oversight is a key governance area.*

Project Governance: Components

Processes for:

- Change
- Communication
- Documentation – i.e., project management plan
- Decision-making
- Internal stakeholder alignment with project process requirements
- Review and approval of changes above project manager authority level
- Risk and issue identification, escalation and resolution
- Stage gate or phase reviews
- Guidelines for aligning project governance and organizational strategy
- Project life cycle and development approach
- Project organization chart with roles
- Project success and deliverable acceptance criteria
- Relationship among project team, organizational groups and external stakeholders

Governance in Adaptive Projects



Can:

- Document outputs and expectations
- Provide a clear view of project status from:
 - Defined iteration/sprint expectations and outputs
 - Releases tied to specific dates
 - “Real-time” monitoring of project output through daily standups

Iterative approaches enable quicker and less costly identification of value-based outputs than predictive

Governance Board

aka Project Board or Steering Committee



Does anyone have experience with a project governance board? Describe how it works with your project.

- Provides project oversight
- May include project sponsor, senior managers and PMO resources
- May be responsible for:
 - Reviewing key deliverables
 - Providing guidance for project decisions



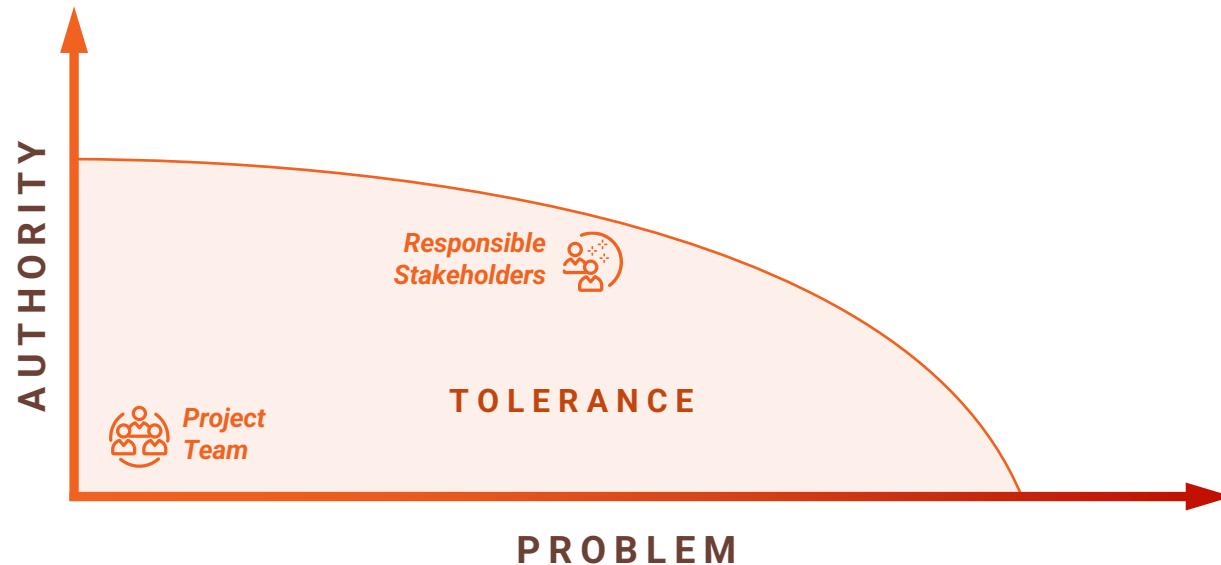
Projects that use Scrum or SAFe® use intermediary governance boards to liaise between the project and organizational governance

Governance Defines Escalation Procedures



For problems outside a project's **thresholds** or **tolerance** levels:

- **Escalate** to the responsible stakeholder who is authorized to take action;
- But if an issue is within the threshold, then work with the team to find a resolution.



Governance and Life Cycles

A Systems View



*Remember the project management principle - **Recognize, evaluate and respond to system interactions***



Governance system works alongside the value delivery system – the **project life cycle**.

Why? To enable smooth workflows, manage issues and support decision making.



Value delivery as
product of life cycle



Value delivery
embedded in life cycle

Governance Checkpoints: Phase Gates and Iterations



Predictive



Adaptive

Split work into **phases**

Review results at a **phase gate** – aka, governance gate, kill point, or tollgate

Decide:

- Continue to the next phase
- Continue with modifications, or
- End a project or program

Split work into releases

Review results at end of iterations

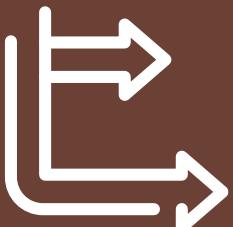
Gather feedback and take action to improve value in next iteration

Continue until customer's acceptance criteria – e.g. definition of done or **MVP** – is satisfied or project ends

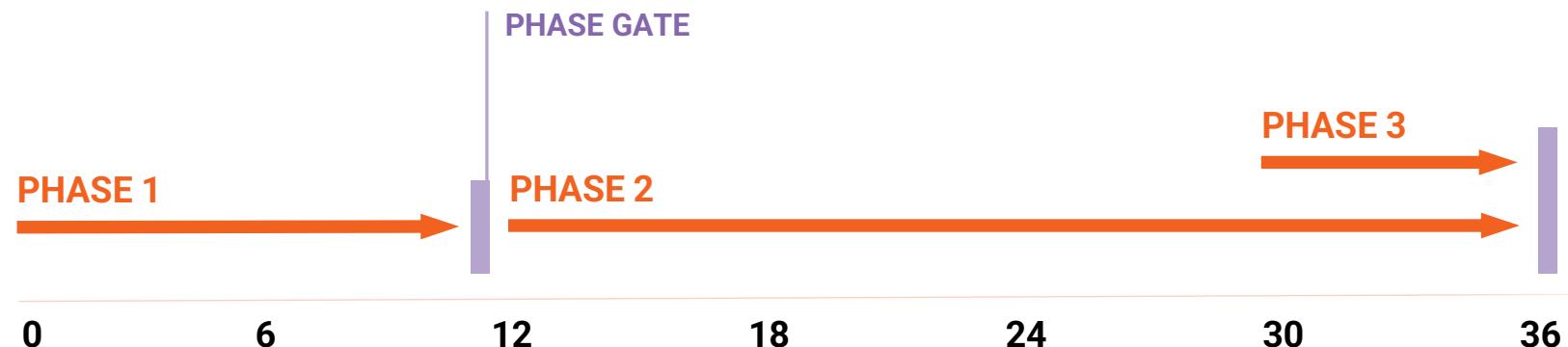


Project Phases

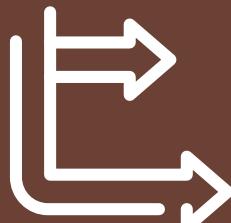
Relationships



Phases produce one or more deliverables; outputs from one phase are generally inputs to the next phase.
They can have **sequential** or **overlapping relationships**.



Apply Governance to Predictive Project Phases



ANGFEN



At the beginning of a phase:

- Verify and validate project assumptions
- Analyze risks
- Provide detailed explanation of phase deliverables

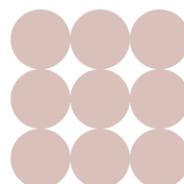
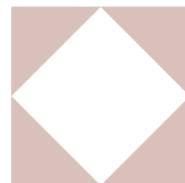
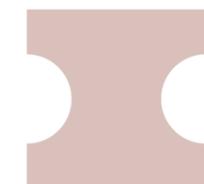
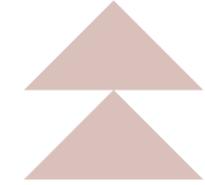
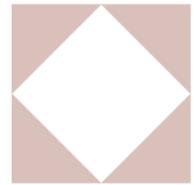
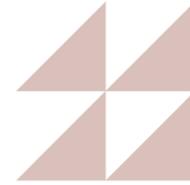
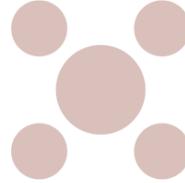
At the end:

- Key deliverables produced
- Review to ensure completeness and acceptance



If huge risks are encountered, deliverables are no longer needed or requirements change, a phase or project will be terminated.

ECO Coverage



2.14 Establish project governance structure

- Determine appropriate governance for a project (e.g., replicate organization governance) (2.14.1)
- Define escalation paths and thresholds (2.14.2)



Project Compliance

TOPIC F

- Internal and external standards include:
 - Government regulations
 - Corporate policies
 - Product and project quality
 - Project risk
- PMO monitors compliance at organizational level
- Project team is also responsible for project activity-related compliance, including:
 - Quality of processes and deliverables/products
 - Procurement and work by vendors

Compliance Requirements

Legal or regulatory constraints include:

- Requirements for specific practices
- Standards
- Privacy laws
- Handling of sensitive information

Quality: Tailor to your project – How much process rigor and quality control is relevant?



Compliance Categories Classification

- Environmental risks
- Workplace health and safety
- Ethical/non-corrupt practices
- Social responsibility
- Quality
- Process risks

Categories vary based on:

- Industry and solution scope
- Unique legal and regulatory exposure

Compliance Threats

How to Investigate

-
- Where/who in the organization handles compliance?
 - What legal or regulatory requirements impact the organization? e.g. workplace safety, data protection, requirements for professional memberships
 - What is the organization's **quality policy**?
 - Are the team and stakeholders aware of compliance matters?



Treat Compliance as a Project Objective

- Proactively track and manage risks for compliance requirements
- Be prepared to perform quality audits
- Continuously validate legal and regulatory compliance for deliverables
- Check compliance before the end of the project to avoid transferring issues
- In a risk or dedicated compliance register, include:
 - The identified risk
 - A responsible risk owner
 - Impact of a realized risk
 - Risk responses



Larger organizations or those in highly regulated industries typically have a compliance department or officer.

Compliance

Five Best Practices

-
- **Documentation:** Updated compliance needs and risks
 - **Risk planning:** Prioritize compliance in risk planning
 - **Compliance council:** Includes quality/audit specialists and relevant legal/technical specialists
 - **Compliance audit:** Formal process
 - **Compliance stewardship:** It's your responsibility!

Interactive/Activity

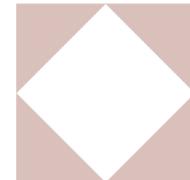
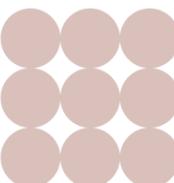
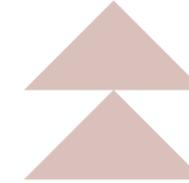
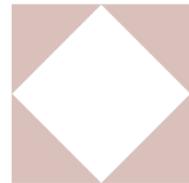
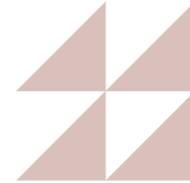
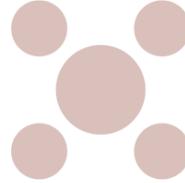


Let's talk about compliance.

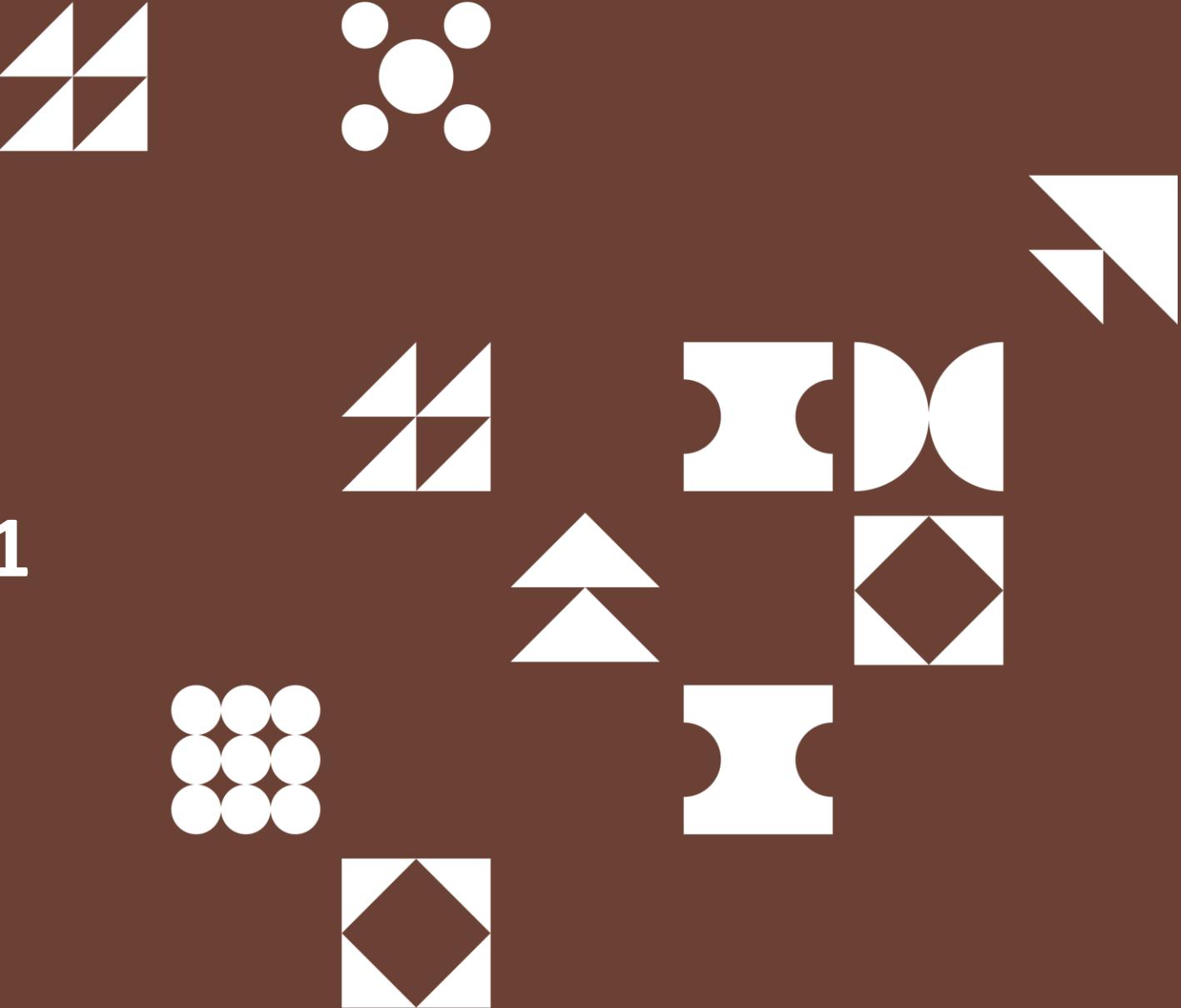
- Does your organization have a quality policy?
- Do you know where to find the quality policy or standards for your projects?
- What kinds of compliance activities are you involved with?



ECO Coverage



End of Lesson 1



DAILY PMP BOOTCAMP SURVEY



LOOK FOR THE SURVEY LINK IN THE CHAT

Our goal is to provide the best possible Bootcamp experience for a live streaming webinar, with hundreds of participants.

For each Bootcamp session,

- Let us know **what you liked** about the experience – your comments really matter.
 - Please include a thank you **to the mentor(s)** working off camera.
- If you have **recommendations**, share those too!

We sincerely value your opinion!

Survey Scale

This Scale: 0 not at all likely- 10 extremely likely



On a scale of 0-10, how likely are you to recommend this bootcamp to someone else?

This Scale: 0 not at all likely - 10 extremely likely



PROJECT MANAGEMENT OFFICE (PMO)

A management structure that standardizes the project-related governance processes and facilitates the sharing of resources, methodologies, tools and techniques. PMOs are more common in larger organizations because of the number of projects that can be in process at the same time.



TAILORING

Tailoring is the deliberate adaptation of the project management approach, governance, and processes to make them more suitable for the given environment and the work at hand.



STRATEGIC PLAN

A high-level business document that explains an organization's vision and mission plus the approach that will be adopted to achieve this mission and vision, including the specific goals and objectives to be achieved during the period covered by the document.



BENEFITS MANAGEMENT PLAN

The documented explanation defining the processes for creating, maximizing, and sustaining the benefits provided by a project or program. It also describes how and when the benefits of a project will be derived and measured. Both the business case and the benefits management plan are developed with the benefits owner prior to the project being initiated. Additionally, both documents are referenced after the project has been completed. Therefore, they are considered business documents rather than project documents or components of the project management plan.



COST-BENEFIT ANALYSIS

Is one method of measuring or evaluating a project's benefit and value.



OPPORTUNITY COST

A concept applied to quantify the missed opportunity when deciding to use a resource (e.g. investment dollars) for one purpose versus another. Alternately opportunity cost is the loss of potential future return from the second-best unselected project. In other words, it is the opportunity (potential return) that will not be realized when one project is selected over another.



INTERNAL RATE OF RETURN (IRR)

The interest rate that makes the net present value of all cash flow equal to zero. This rate is a function of the cost of capital for project implementation.



RETURN ON INVESTMENT (ROI)

A financial metric of profitability that measures the gain or loss from an investment relative to the amount of money invested.



CHANGE MANAGEMENT

A comprehensive, cyclic, and structured approach for transitioning individuals, groups, and organizations from a current state to a future state in which they realize desired benefits. It is different from project change control, which is a process whereby modifications to documents, deliverables, or baselines associated with the project are identified and documented, and then are approved or rejected.



THRESHOLD

A predetermined value of a measurable project variable that represents a limit that requires action to be taken if it is reached.



TOLERANCE

The quantified description of acceptable variation for a quality, risk, budget, or other project requirement.



ESCALATE

The act of seeking helpful intervention in response to a threat that is outside the scope of the project or beyond the project manager's authority.



PROJECT LIFE CYCLE

The series of phases that a project passes through from its start to its completion.



PHASE

Refers to a collection of activities within a project. Each project phase is goal oriented and ends at a milestone.



PHASE GATE

A point review at the end of a phase in which a decision is made to continue to the next phase, to continue with modification, or to end a project or program.



MINIMUM VIABLE PRODUCT (MVP)

The smallest collection of features that can be included in a product for customers to consider it functional. In Lean methodologies, it can be referred to as “bare bones” or “no frills” functionality.



SEQUENTIAL RELATIONSHIP

Refers to a consecutive relationship between phases; phases occur in procession and without overlap.



OVERLAPPING RELATIONSHIP

A type of phase-to-phase relationship characterized by phases that start prior to the ending of the previous phase. Therefore, activities in different phases run concurrently with one another.



QUALITY POLICY

The basic principles that should govern the organization's actions as it implements its system for quality management.