



PMP® EXAM PREP

PMI Authorized Training Partner

BOOTCAMP

Session 4

Class will begin at 10 am EST

Attendance Alert
Please make sure you log into Zoom with your correct first name and last name and enter the same information for every session.

Instructors:
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Orlando Sequera, MSPM, 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)

Creating a High-Performing Team		Starting the Project	Doing the Work	Keeping the Team on Track	Keeping the Business in Mind
	Lesson 1	Lesson 2	Lesson 3	Lesson 4	Lesson 5
Topic A	Build a Team	Determine Appropriate Project Methodology/Methods and Practices	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	Empower Team Members and Stakeholders	Plan and Manage Budget and Resources	Engage Stakeholders	Manage Conflict	Support Organizational Change
Topic E	Train Team Members and Stakeholders	Plan and Manage Quality of Products and Deliverables	Create Project Artifacts	Collaborate with Stakeholders	Employ Continuous Process Improvement
Topic F	Engage and Support Virtual Teams	Integrate Project Planning Activities	Manage Project Changes	Mentor Relevant Stakeholders	
Topic G	Build Shared Understanding about a Project	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			



Ensure Knowledge Transfer For Project Continuity

TOPIC H

Deliverables and Tools

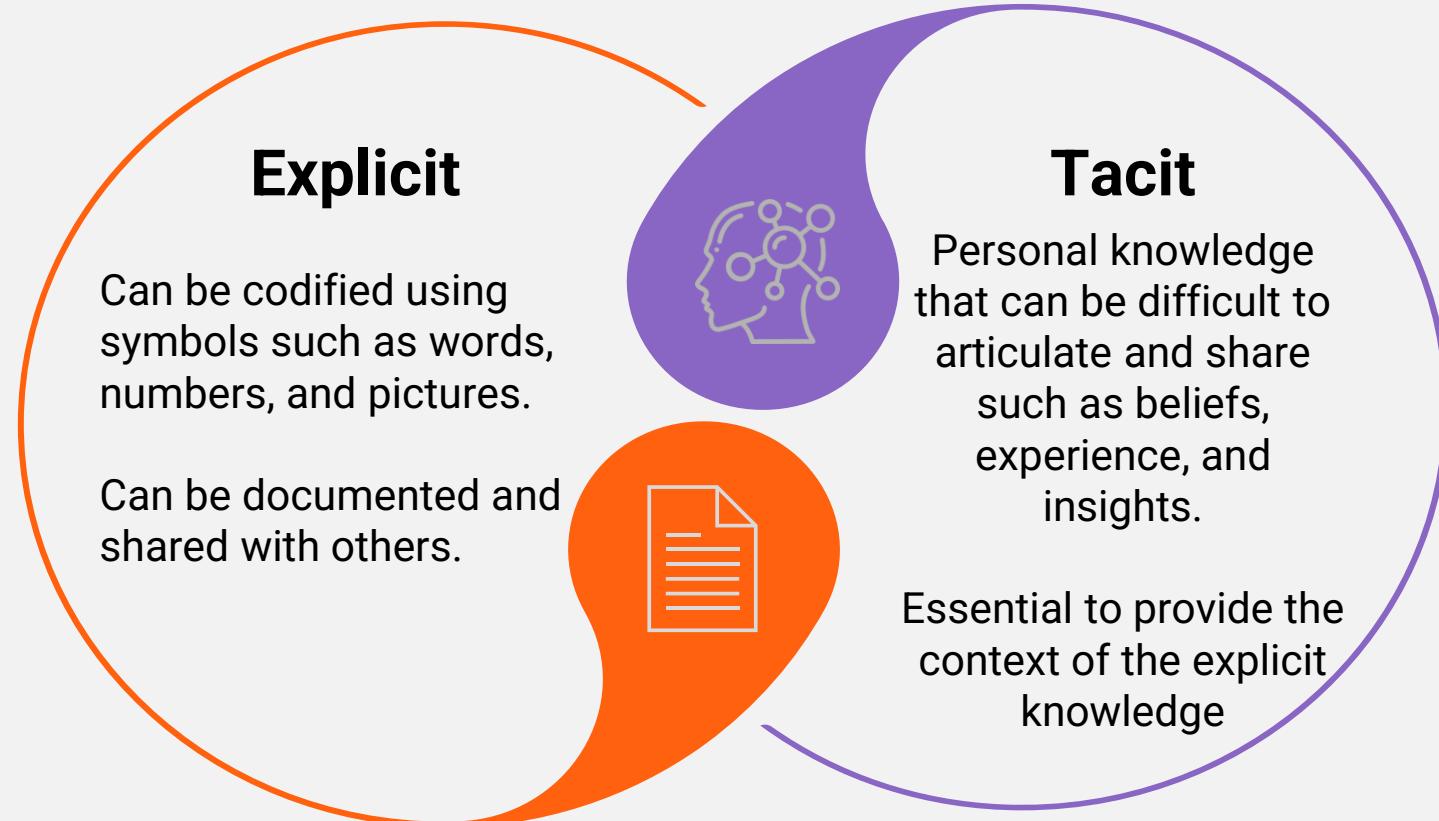


Lessons Learned Register



No specific tools

Knowledge Types



Knowledge Management

Level	Description
Individual	<p>Each team member needs to know how to perform their work in accordance with each assigned task's scope, schedule, and cost.</p> <p>Acquire required knowledge by:</p> <ul style="list-style-type: none">• Research• Collaboration with team members• Examination of the project's or organization's knowledge repository
Project	<ul style="list-style-type: none">• Focus on achieving the goals of the current project.• Solicits knowledge about other projects that can be applied to the current project.• Project Management Office (PMO) is an excellent source of knowledge, as it exists for the purpose of defining and maintaining standards for project management within an organization.
Organization	<ul style="list-style-type: none">• Focus on managing programs or portfolios.• The program manager or portfolio manager seeks information from peers who manage other programs or portfolios, to adapt this knowledge to their specific need.

Ensure
Knowledge
Transfer For
Project
Continuity,
LESSON 3,
TOPIC H

Lessons Learned

- ✓ Knowledge gained during a project can be useful to subsequent phases of a project and to other projects.
- ✓ Include both **positive** and **negative** experiences that occur throughout the project life cycle.
- ✓ Avoids “**reinventing the wheel**”
- ✓ Long-term learning tool.



Ensure Knowledge Transfer For Project Continuity, LESSON 3, TOPIC H

Considerations for Lessons Learned

Schedule at the **right time**

Include topics on:

- ✓ Conflict management
- ✓ Vendor relationships
- ✓ Customers
- ✓ Strategy
- ✓ Tactics



Ensure Knowledge Transfer For Project Continuity, LESSON 3, TOPIC H

Project Responsibilities Within the Team



Working Environment Expectations

- ✓ Knowledge is not constant, what we knew yesterday can change based on what we did today.
- ✓ Continuously evaluate the project environment for new risks and follow the risk management plan to proactively address them before they become issues that will affect the project objectives.
- ✓ Don't hoard knowledge; follow the communications management plan and inform stakeholders of changes affecting their work.
- ✓ Use appropriate tools to share knowledge with stakeholders:
 - Face-to-face during formal meetings
 - Face-to-face during informal meetings and discussions
 - Telephone
 - Email
 - Wikis
 - Intranet
 - Printed documents





Knowledge Transfer Approach

Connect individuals, in person or virtually, to share tacit knowledge and collaborate together.



Knowledge Transfer Techniques

- ✓ Networking
- ✓ Facilitating special interest groups
- ✓ Meetings, seminars, and various other types of in-person and virtual events that encourage people to interact and exchange ideas and knowledge.
- ✓ Training that involves interaction between attendees.
- ✓ Work shadowing and reverse shadowing provide a more individualized method to the exchange of specialized knowledge.

Ensure Knowledge Transfer For Project Continuity, LESSON 3, TOPIC H

GUIDELINES

Maintain Team and Knowledge Transfer

- Follow your PMO's guidelines on documenting new knowledge.
- Be alert to new sources of project knowledge and follow the communications management plan to convey that knowledge to stakeholders.
- Proactively seek new knowledge.
- Compile a lessons-learned register throughout the project's lifecycle and add it to a lessons-learned repository with registers from other projects.

Ensure
Knowledge
Transfer For
Project
Continuity,
LESSON 3,
TOPIC H



LESSON 4

KEEPING THE TEAM ON TRACK

- Lead a Team
- Support Team Performance
- Address and Remove Impediments, Obstacles, and Blockers
- Manage Conflict
- Collaborate with Stakeholders
- Mentor Relevant Stakeholders
- Apply Emotional Intelligence to Promote Team Performance



Ensure Knowledge Transfer For Project Continuity, LESSON 3, TOPIC H



Lead a Team

TOPIC A

Deliverables and Tools



Vision / Mission document
Charter
Product box
Reward and Recognition Plan



Diversity awareness
Leadership styles
Influence matrix
Salience model
Power grids
Behavior modeling
Challenge status quo
Recognize contributions
Remove impediments
Communicate vision

Leadership

The project manager is the visionary leader for the project.

- ✓ Educate the team and other stakeholders about project value delivery
- ✓ Promote teamwork and collaboration
- ✓ Remove roadblocks

Promote the project's mission and value to inspire the team, keep them focused and feel part of the organization's mission.



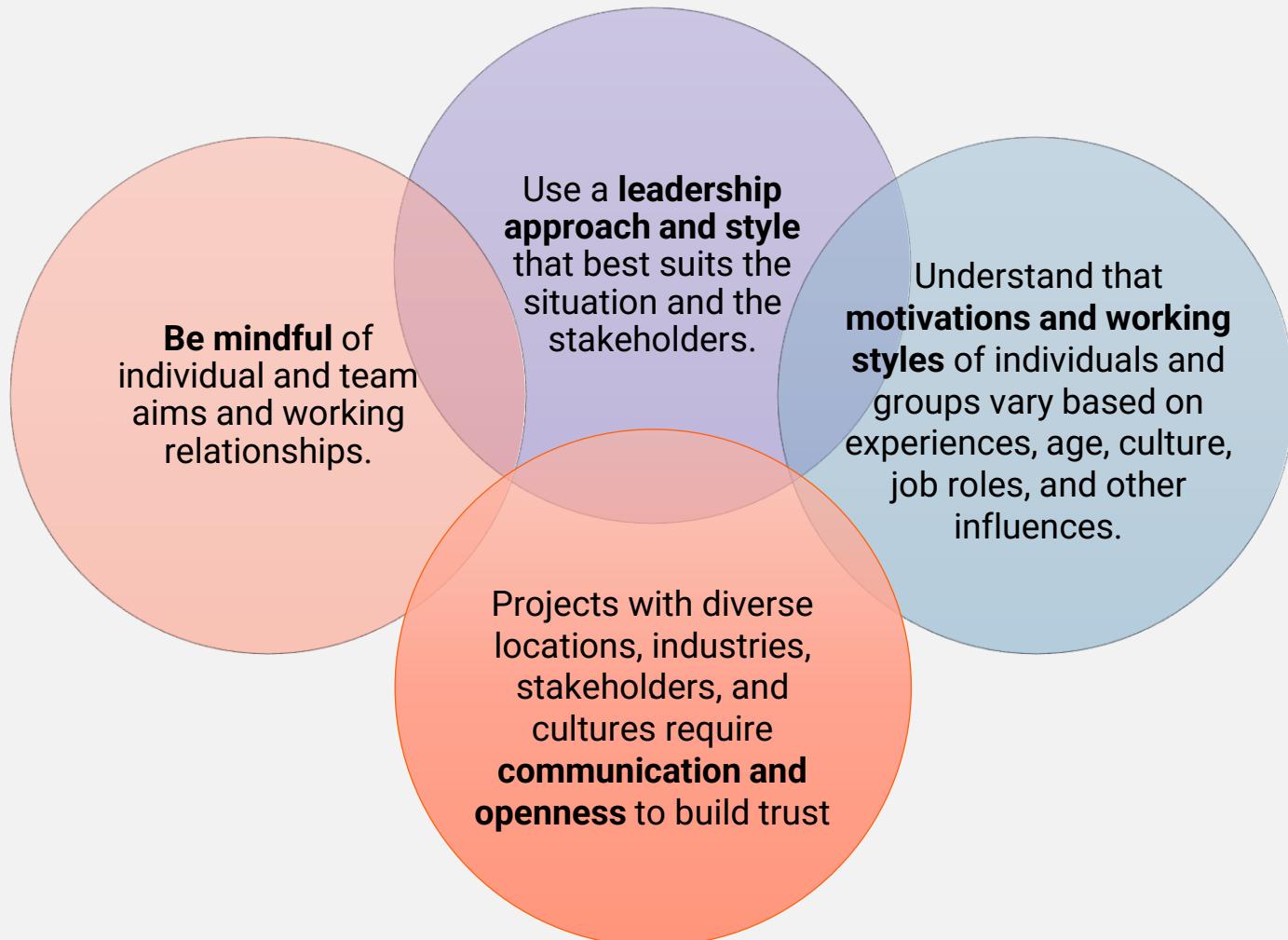


Leadership Skills

- ✓ Conflict management
- ✓ Cultural awareness
- ✓ Decision making
- ✓ Facilitation
- ✓ Meeting management
- ✓ Negotiation
- ✓ Networking
- ✓ Observation/conversation
- ✓ Servant Leadership
- ✓ Team building

Lead a Team, LESSON 4, TOPIC A

Diversity Awareness and Cultural Competencies



Leadership ≠ Management



Lead a Team, LESSON 4, TOPIC A

Lead and Manage

Let's reflect on two of the project manager's roles to understand the difference.

Management	Leadership
Direct using positional power	Guide, influence, and collaborate using relational power
Maintain	Develop
Administratate	Innovate
Focus on systems and structure	Focus on relationships with people
Rely on control	Inspire trust
Focus on near-term goals	Focus on long-range vision
Ask how and when	Ask what and why
Focus on bottom line	Focus on the horizon
Accept status quo	Challenge status quo
Do things right	Do the right things
Focus on operational issues and problem solving	Focus on vision, alignment, motivation, and inspiration



Leadership Traits



Strong personal ethics, integrity, and trustworthiness



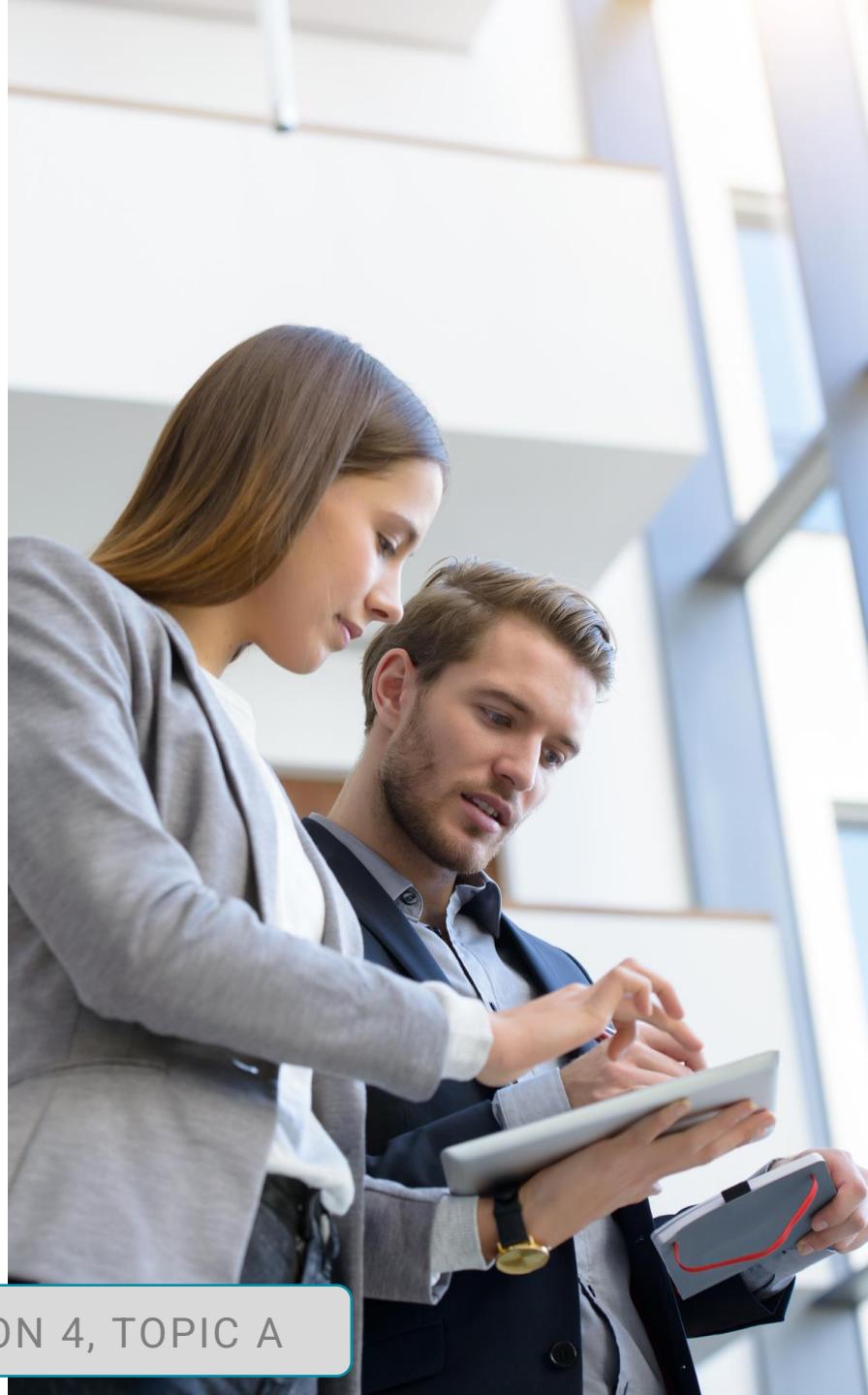
Interpersonal skills (communicator, collaborator, motivator)



Conceptual and analytical skills

Servant Leadership

- ✓ Facilitate rather than manage
- ✓ Provide coaching and training
- ✓ Remove work impediments
- ✓ Focus on accomplishments



Lead a Team, LESSON 4, TOPIC A

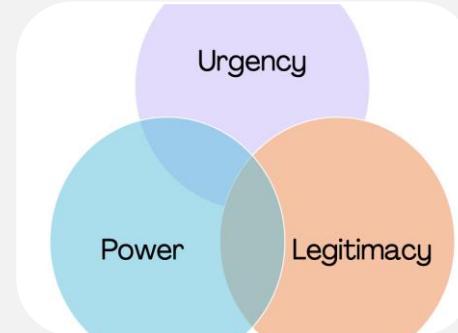


Challenge the Status Quo

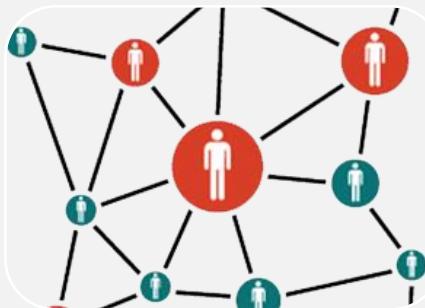
- ✓ Let past experiences and processes provide guidance to but not dictate your actions.
- ✓ Commit to a **growth mindset** to continuously improve and innovate, to find new ideas and perspectives.
- ✓ Discover the best approach through **challenge** and **introspection**.
- ✓ Avoid complacency and blind acceptance.

360 View of Stakeholders

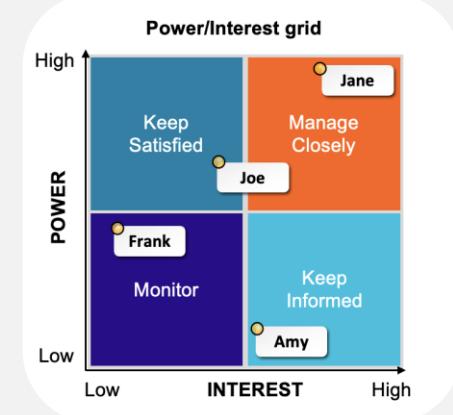
- ✓ Good leadership is based partially on your influence and the influence of the other project stakeholders.
- ✓ Use tools and techniques to ensure that you understand your stakeholders. Some examples:



Salience Model



Directions of Influence



Power/Impact/Interest Grid



Team Building

- ✓ Cohesion and **solidarity** help teams perform better.
- ✓ Good leadership facilitates the **bonding** between project team members.
- ✓ Team-building activities build **unity, trust, empathy, and focus** on the team over the individual.

Lead a Team, LESSON 4, TOPIC A

Team Building

Use rewards and recognition to keep teams motivated.

Rewards

- ✓ Tangible, consumable items
- ✓ A specific outcome or achievement achieved
- ✓ Definite start and finish, or fixed time
- ✓ Usually expected when goal is met



Motivate towards a specific outcome; never without recognition too.

Recognition

- ✓ Intangible, experiential event
- ✓ Acknowledge behavior rather than outcome
- ✓ Not restricted to a set time
- ✓ Usually not expected by recipient



To increase recipient's feeling of appreciation; can be given without a reward

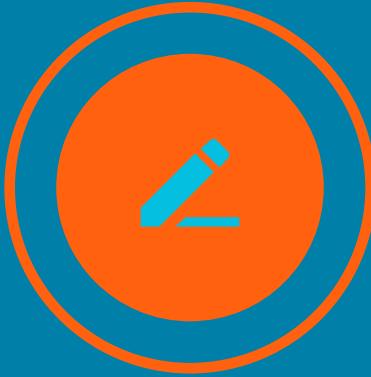
GUIDELINES

Lead a Team

- Use emotional intelligence and other leadership methods to motivate your team.
- Adapt your leadership style to work best with each stakeholder.
- Establish good communication among team members, internally and externally.
- Monitor performance of team members on an ongoing basis.
- Manage conflict.
- Establish an issues log to track and assign project issues.

Lead a
Team,
LESSON 4,
TOPIC A





Support Team Performance

TOPIC B

Deliverables and Tools



RACI matrix
Management by Objectives
Benchmarking
Performance reports



RACI matrix
Task boards
Performance tracking tools
Information Radiators
Burnup charts
Earned Value
Throughput metrics
Cycle time
Value stream map

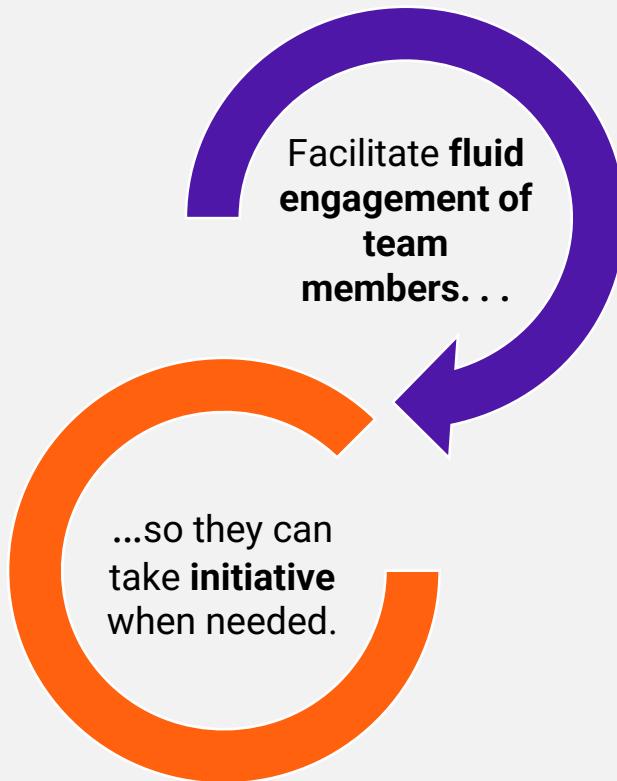
Strive to shape a team with a **healthy culture** of working **autonomy** and a shared **sense of responsibility** for their work.



Support Team Performance, LESSON 4, TOPIC B

Team Structure and Workspaces

- ✓ Team environments are physical and virtual.
- ✓ Factor in environment and location to team performance.
- ✓ Foster meaningful interaction—this is a core tenet of agile.
- ✓ Respect agreed team working hours and practices.



Use shared workspaces to foster informal and immediate collaboration.



Support Team Performance, LESSON 4, TOPIC B

Team members need to be able to contribute from everywhere and at any time.



Empowerment and Unity

- ✓ Empower them to make **timely decisions**.
- ✓ Encourage the team's **sense of ownership of the work**.
- ✓ Encourage the team to **foster collaborative work and decision making**.
- ✓ **Prioritize team unity.** Individual contributions are important, but team unity is critical.





Autonomy and Teamwork

Know when to interfere. In general, people work more productively when granted autonomy.

Include the team in:

- ✓ Clarifying and prioritizing requirements
- ✓ Splitting requirements into tasks
- ✓ Estimating effort



Keep the Tone Positive and Fluid

- ✓ Establish a culture of **fluid communication** and engagement in a workspace that promotes **positive interactions**.
- ✓ It makes leading and managing a team easier.

Team Building Activities

- ✓ Also known as “team-building strategies”
- ✓ Formal or informal
- ✓ Brief or extended
- ✓ Facilitate yourself or use a group facilitator



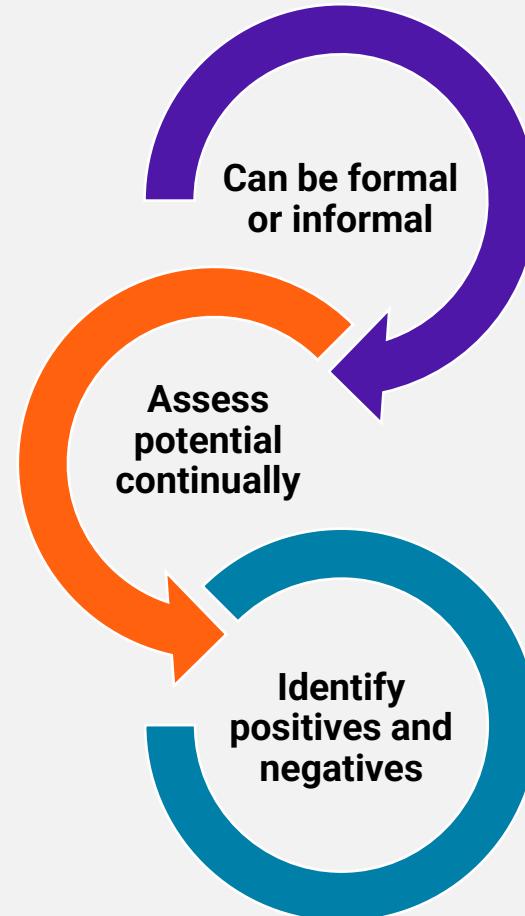


A photograph of three people standing on a blue surface against a white background. A man on the left, a woman in the center, and another woman on the right are holding a large, solid blue rectangular sign between them. The woman in the center is looking towards the other two, while the others are looking down at the sign.

Use team-building activities to influence diverse individuals from many functional areas, each with their own goals, needs, and perspectives, to work as a cohesive team, for the good of the project.

Team Performance Assessments

- ✓ Improve team member interaction
- ✓ Solve issues
- ✓ Deal with conflicts
- ✓ Improve team member skills and competencies
- ✓ Increase team cohesiveness



Performance Assessment Tasks

- ✓ Compare performance to goals
- ✓ Reclarify roles and responsibilities
- ✓ Deliver positive as well as negative feedback
- ✓ Discover unknown or unresolved issues
- ✓ Create and monitoring individual training plans
- ✓ Establish future goals

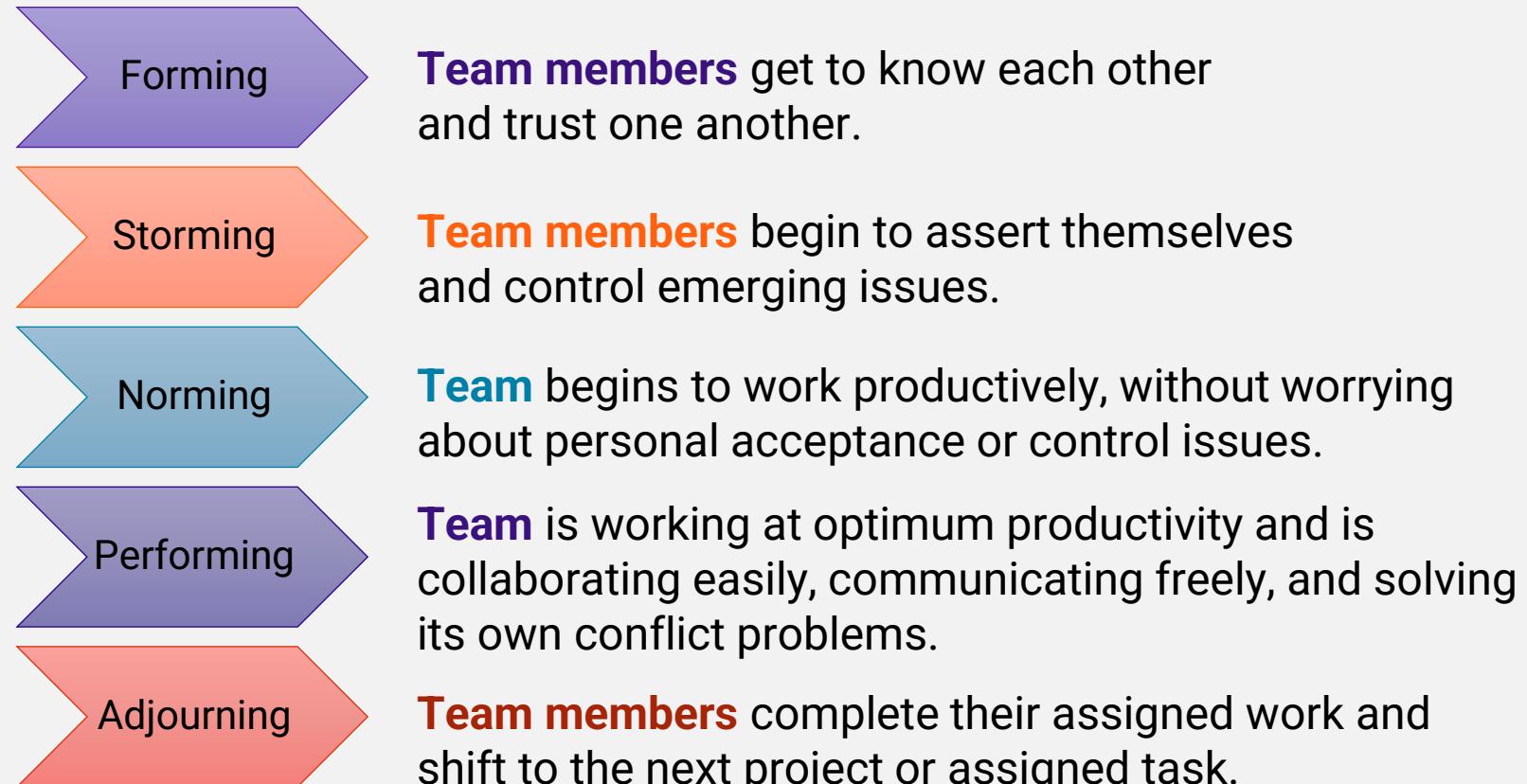




Team Development

- ✓ Is a process which can **progress and regress**
- ✓ Acknowledges **diversity** and promotes **inclusivity**
- ✓ Requires **trust, communication, and respect**
- ✓ Takes **effort!**

Team Development Stages (Tuckman ladder)



**More
about...**

Course: Leading the Team (2021 Update)

Video: Stages of Personal and Team Development (8:49 run time)

Watch: Start to 3:48 and 5:33 to end

Stages of Personal and Team Development



Manage with Objectives

- ✓ Use clear objectives for a more productive and driven team.
- ✓ Set objectives collaboratively with the team.
- ✓ Create challenging, yet attainable objectives.
- ✓ Conduct objective setting:
 - At the start of a project or phase
 - Throughout the project life cycle, as in an iteration planning session



Feedback

- ✓ Is crucial for any team, using any methodology, in any environment.
- ✓ Discover the most appropriate and timely means of feedback.
 - Public/private
 - Individual/group
- ✓ Give and receive constructive feedback freely.



Performance Tracking Techniques

Tool	
Scrum/Agile/Kanban boards	Based on the Japanese management method of pulling cards to various stages as they are worked on, physical or electronic boards can track work as it progresses across various stages or categories.
Throughput Metrics	Measurement of the team's work that has moved from one stage to another stage over a certain time.
Cycle Time	Measurement of work that has progressed all the way from plan to completed or delivered.
Quality Metrics	Various measurements to track quality deliverables, defects, and acceptable output.
Earned Value	Tracking cost and effort performance against a planned value.
Bar Charts (Gantt)	Using the project schedule to track performance over time.
Velocity	Measurement of total output from an iteration to attempt to predict future iteration outputs.



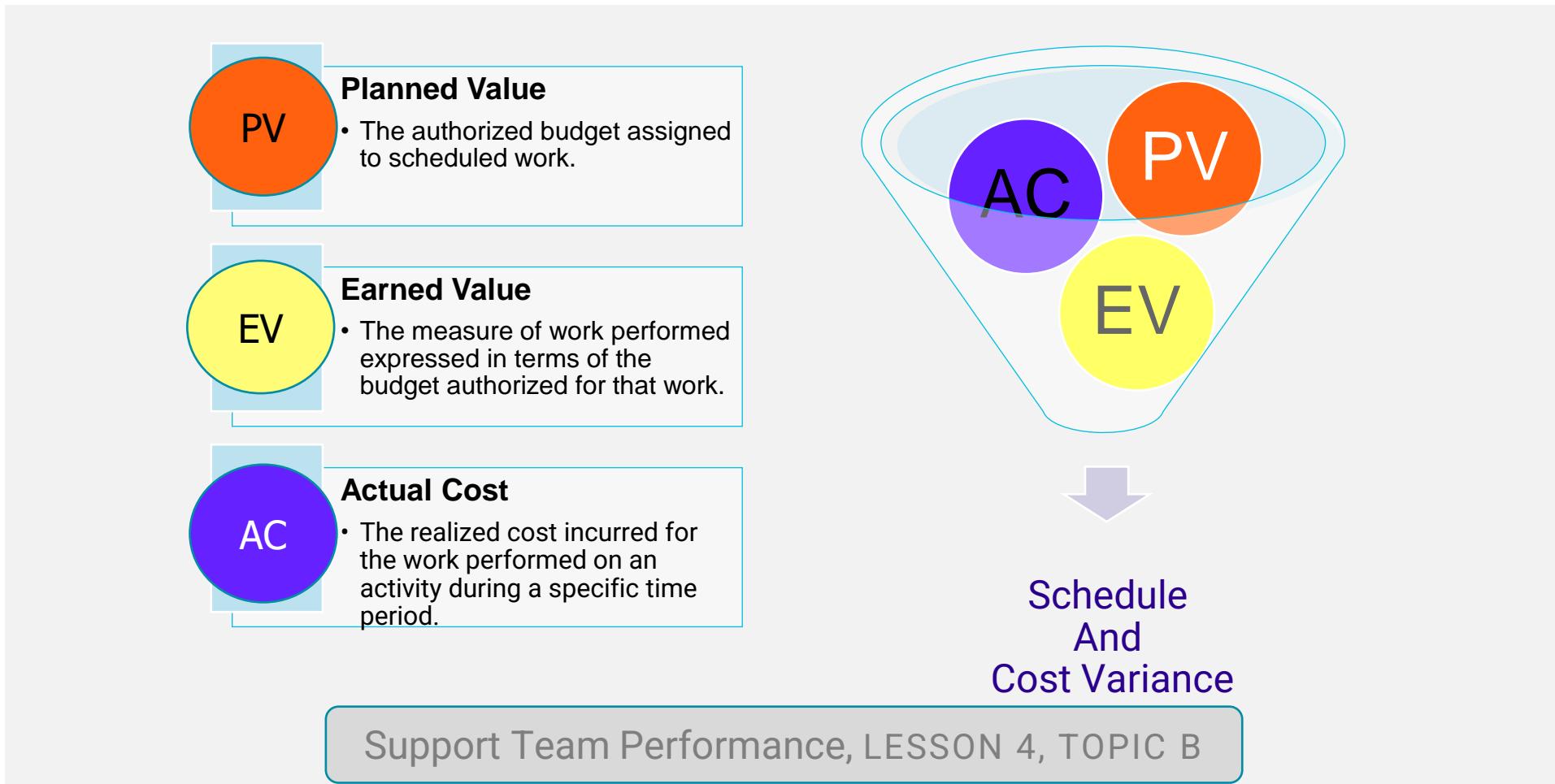


The monetary **value** of the work contribution is another way of supporting and measuring performance.

Support
Team
Performance,
LESSON 4,
TOPIC B

Earned Value Management (EVM)

In projects that use earned value management, the cost baseline is referred to as the performance measurement baseline.

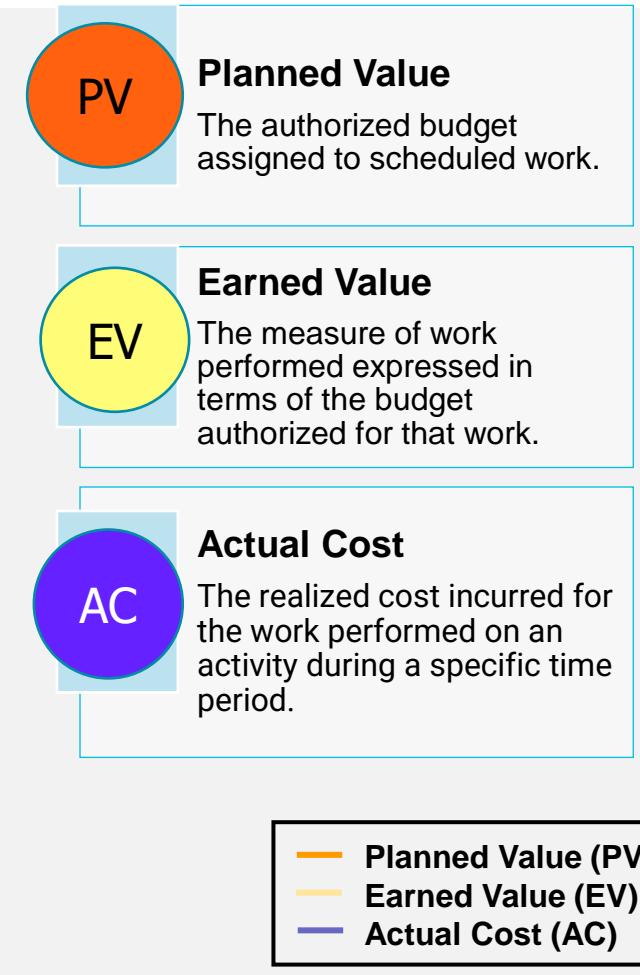


**More
about...**

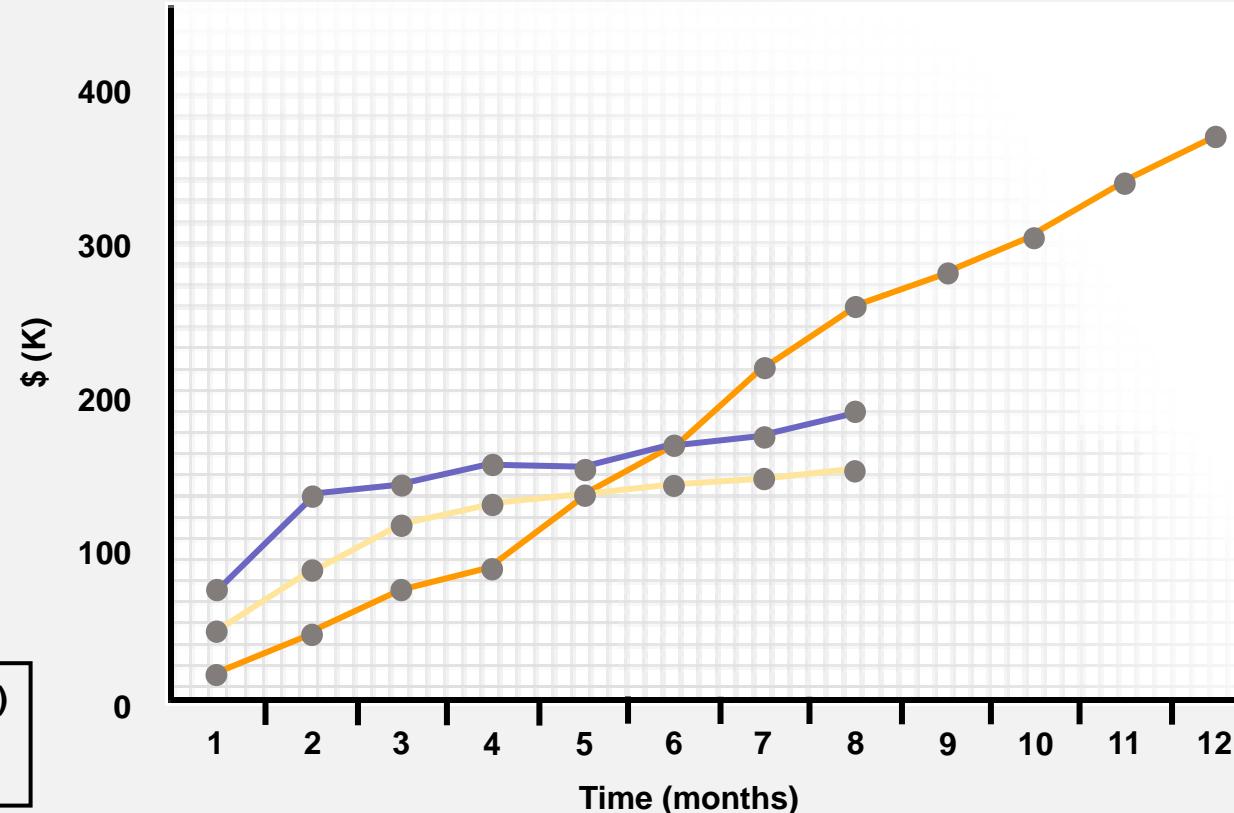
Course: Planning and Managing the Project Budget (2021 Update)
Video: Planned Value and Earned Value Calculations (5:29 run time)

Planned Value and Earned Value Calculations

Earned Value Management (EVM)



$EV = \% \text{ work complete to date} \times \text{budgeted cost}$



EVM Measures for Cost Control

Cost Variance - the amount of budget deficit/surplus at a given point in time, expressed as the difference between EV and AC.

- A positive CV indicates a project is under budget.
- A zero CV indicates a project is on budget.
- A negative CV indicates a project is over budget.

$$(CV = EV - AC)$$

Cost Performance Index - a measure of the cost efficiency of budgeted resources expressed as the ratio of EV to AC.

- A CPI number greater than 1.0 indicates a project is under budget.
- A CPI of 1.0 means the project is on budget.
- A CPI number less than 1.0 indicates a project is over budget.

$$(CPI = EV / AC)$$

More about...

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

Video: Traditional Approach to Monitoring Cost Performance (6:09 run time)

Traditional Approach to Monitoring Cost Performance

EVM Measures for Schedule Control

Schedule Variance - a measure of schedule performance expressed as the difference between the EV and the PV.

- A positive SV indicates a project is ahead of schedule.
- A zero SV indicates a project is on schedule.
- A negative SV indicates a project is behind schedule.

$$(SV = EV - PV)$$

Schedule Performance Index - a measure of schedule efficiency expressed as the ratio of EV to PV.

- An SPI number greater than 1.0 indicates a project is ahead of schedule.
- An SPI of 1.0 means the project is on schedule.
- An SPI number less than 1.0 indicates a project is behind schedule.

$$(SPI = EV / PV)$$

More about...

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

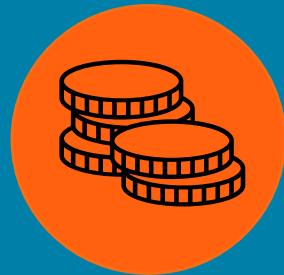
Video: Traditional Approach to Budget Forecasting (6:09 run time)

Watch: Start to 4:26

Traditional Approach to Budget Forecasting

Estimate at Completion Analysis

Estimate At Completion (EAC) - The current projected final cost of the project.



Based on the current spending efficiency (the CPI).



Calculated from the following formula, where BAC is the projected budget at completion:

$$EAC = \frac{BAC}{CPI}$$

Estimate To Complete

Estimate To Complete (ETC) - The amount of money needed to complete the project.



Based on the current spending efficiency of the project.



Calculated using the formula below:

$$ETC = EAC - AC$$



Address and Remove Impediments, Obstacles, and Blockers

TOPIC C

KEEPING THE TEAM ON TRACK > ADDRESS AND REMOVE IMPEDIMENTS,
OBSTACLES, AND BLOCKERS

Deliverables and Tools

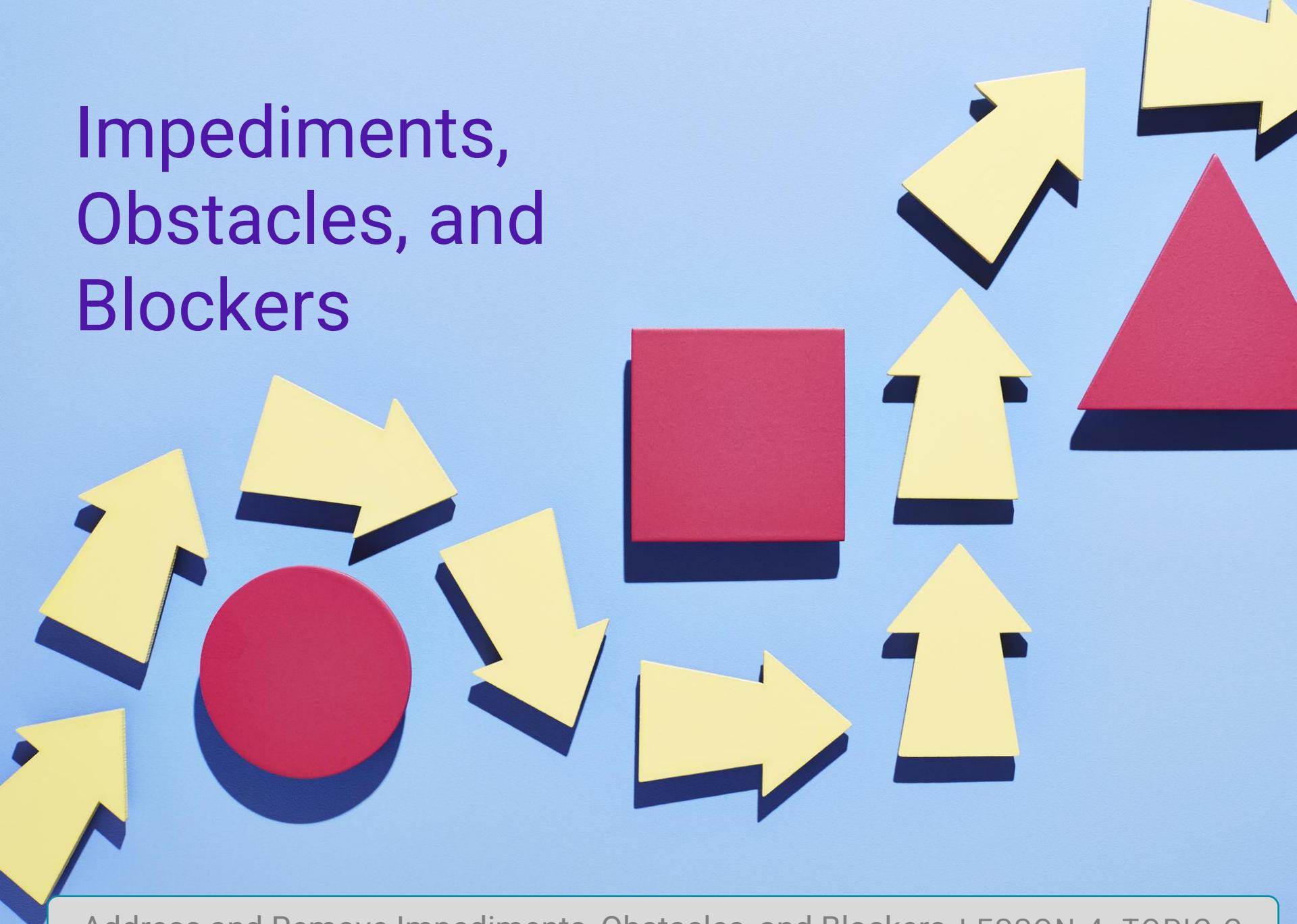


- Backlog (reprioritized)
- Updated risk register
- Action plans
- Updated impediment task board



- Daily standup
- Sprint reviews
- Risk reviews
- Backlog assessment

Impediments, Obstacles, and Blockers



Address and Remove Impediments, Obstacles, and Blockers, LESSON 4, TOPIC C

Impediments, Obstacles, and Blockers

The team can't agree on a solution!

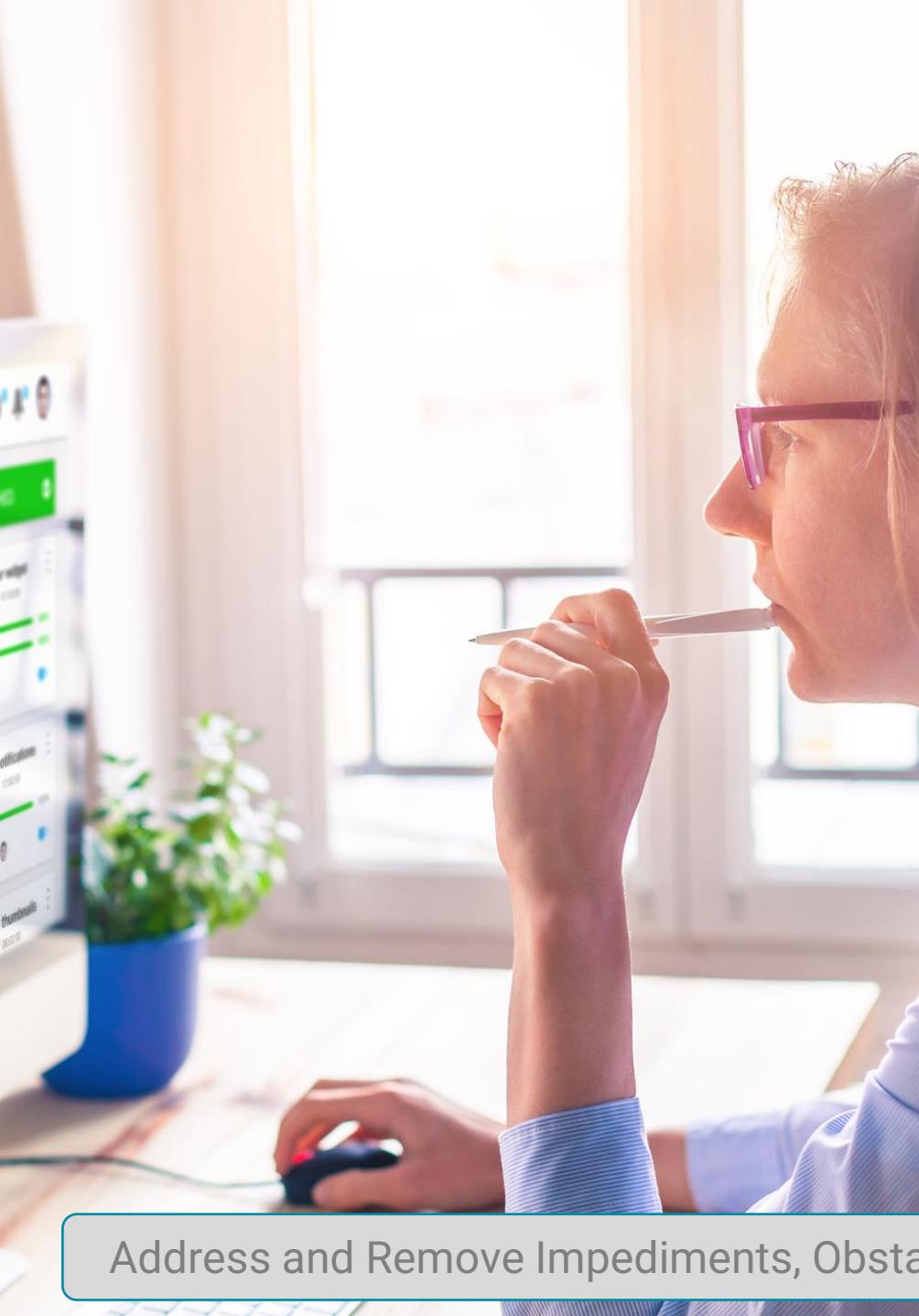


Construction can't begin before permits are granted!



The company has halted the use of the product until a new contract is signed!





Tracking Impediments

Tracking impediments as they are raised, addressed, and resolved, to ensure communication and oversight.

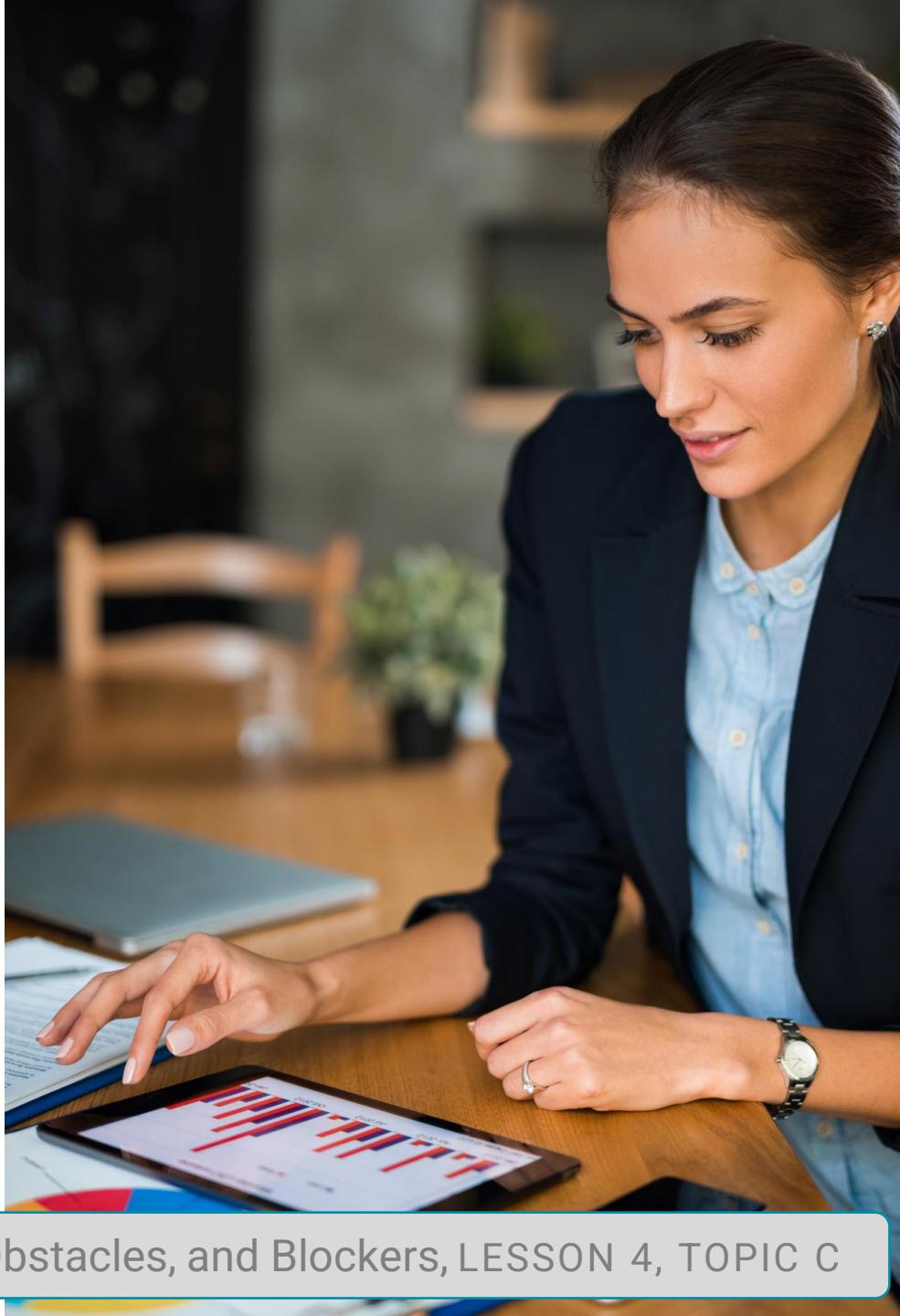
Track impediments with:

- ✓ Issue log
- ✓ Kanban (task) board
- ✓ Software applications

Capture the status and efforts associated with the identified impediments.

Risk Reviews/ Risk Register

- ✓ Impediments may be due to, or a result of, project risks or issues.
- ✓ Risks raised formally during the daily standup meetings, iteration reviews, or informally, are added to the risk register.
- ✓ Newly identified and existing risks are updated based on the current knowledge and situation.



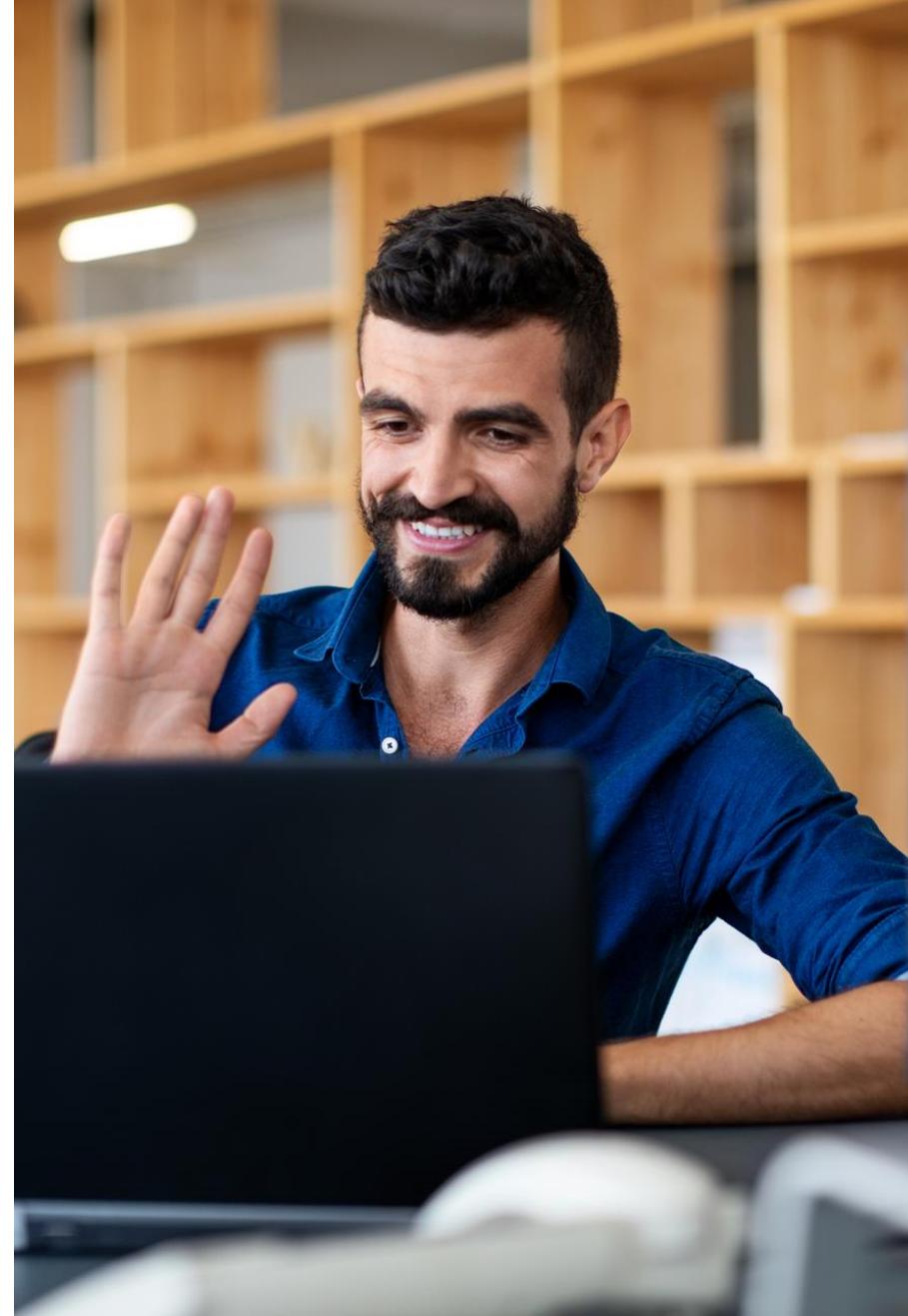
Handle Impediments as a Servant Leader

Aim to **create an unobstructed path** for the team so they can contribute and deliver.

Optimize the workplace to be free of obstacles and other impediments.

- ✓ Create the right team space
- ✓ Focus efforts on work
- ✓ Remove distraction, non-value work, and other confusion

Take on most of the burden of **addressing and removing impediments** so the team can do their best work.



Address and
Remove
Impediments,
Obstacles,
and Blockers,
LESSON 4,
TOPIC C

GUIDELINES

Working with External Stakeholders, Other Projects, and Work Demands

- Work with the team to assess and evaluate the impediment.
- Review previous attempts or efforts to fix the problem.
- Discuss impact and solutions.
- Connect the impediment to the external source.
- Establish a single point of contact (SPOC) within the team, typically the project manager or person with the most subject matter knowledge.
- Shield the rest of the team to focus on other work.
- Create action plan and schedule.
- Follow up and communicate per agreements.
- Document resolution and lessons learned for future reference.



Address and Remove Impediments, Obstacles, and Blockers, LESSON 4, TOPIC C

GUIDELINES

Prioritize Critical Impediments, Obstacles, and Blockers

- Define the prioritization categories appropriate for team, project, and/or organization.
- Redefine levels as needed.
- Anchor the priority levels with real examples.
- Clarify the new and still open impediments.
- Review the impact or potential impact to the team and to the project objectives.
- Assign a priority to each impediment as a team or a selected subgroup based on connection to the impediment
- Communicate the priorities in a visible place, such as an information radiator.
- Create action plans for the highest priority impediments.
- Continually reassess for impediments, obstacles, and blockers.



MASTERY BUILDER

What is true of lessons learned during the project?

- Should be documented only in the closeout report.
- Should consist of only project data.
- Should be documented throughout the project.
- Should consist of only things that went well during project execution.

Creating a
high
performing
team



MASTERY BUILDER

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Creating a
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MASTERY BUILDER

What is the difference between a lessons-learned register and a lessons-learned repository?

- The two terms mean the same thing.
- The register applies to a single project, and the repository applies to many projects.
- The repository applies to a single project, and the register applies to many projects.
- The register contains only areas that need improvement in future projects, and the repository contains areas of improvement as well as positive findings.

Creating a
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MASTERY BUILDER

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Creating a
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MASTERY BUILDER

The product owner is unavailable to make a decision about a product feature. What is this considered?

- Work request
- Impediment
- Backlog refinement
- Priority

Creating a
high
performing
team



MASTERY BUILDER

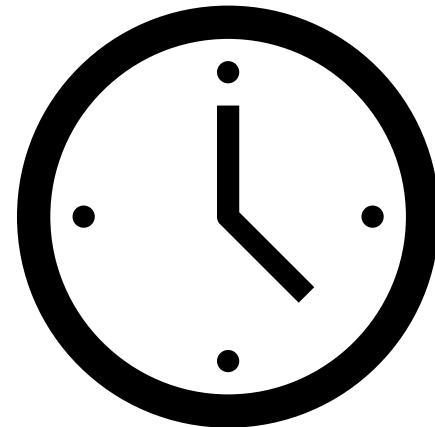
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Creating a
high
performing
team



1-Hour Break!



**Class resumes at
2:30pm Eastern Time**