



# **PMP® EXAM PREP BOOTCAMP**

## **Session 2**

**PMI  
Authorized Training Partner**

### **ATTENDENCE TRACKING**

**Percipio Users:**  
Name is based on your log in information in Percipio

**Using Zoom:**  
Enter your first and last name

# BREAKS

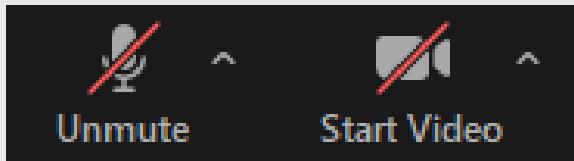


<b>Part 1</b>	<b>Periodic breaks</b>
<b>1 –hour break</b>	<b>At the 3.5 Hour Mark</b>
<b>Part 2</b>	<b>Periodic breaks</b>

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

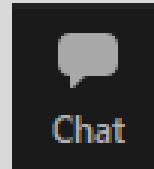


**We are saving  
everyone's  
bandwidth  
usage  
by  
disabling  
cameras and  
microphones**



## WAYS TO PARTICIPATE

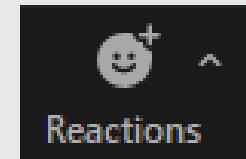
Find the **Chat option** in your Zoom command bar



Change the **To: field** in the blue box to **Everyone**.



Explore the **Reactions option** in your Zoom command bar



This is a fun way to provide quick and easy feedback

# CHAT vs Q & A

Please use the **Chat** for:

- **Greetings** before the session starts and during breaks
- Once the session starts , the chat may be closed or changed to *Hosts & Panelists Only* to minimize disruptions and focus on important information.
- The instructor may open the chat during the session for student **to respond to the instructor's questions** and create a group dialog.

# CHAT vs Q & A

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
- The Q&A may be open and closed throughout the session to allow us to address questions/issues in a timely manner.
- **Please be very patient, the support team responds to many inquiries per session**

# IS LIVE ATTENDANCE REQUIRED?

- **YES**, if you are taking this training to register for the PMP exam
- You are **allowed to miss one session IF** you make up the session by **watching the video replays**.
- If you miss **more than one session**, you will need to make up the missed time for **those additional missed sessions** by **attending live in another 5-day cohort**.
- A **missed session means** you were disconnected for **more than a total of 15 mins** for the duration of the session (not including the 1-hour lunch break if you get disconnected).
- \*Please see the Bootcamp Calendar for information about upcoming sessions at: <http://calendar.skillsoft.com/>



# ACCESSING THE

# VIDEO REPLAYS

1. Go to: <https://github.com/Skillsoft-Content/PMPReplay>
2. Replays will be available within 2 business days after the session ends.
3. Click on the Excel file for the year you attended the Bootcamp. You won't see a *file open* option, but it is selected.
4. Click the *Download raw file* button on the far left-hand side.
5. Open the downloaded file using this password: pmpB00tcampReplay!



Those are zero's not the letter O. The password is case sensitive.

7. Locate and open the worksheet tab that corresponds with the bootcamp you attended
8. Make a note of the passcode.
9. Paste the provided link into your browser.
10. Complete the required registration steps
11. Input the passcode when prompted  
The password to open the Excel file is NOT the passcode to access the replay.

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

**No limit to watch replays to study**

# Recap Session 1



# 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
Topic B	(1B) Strategic Alignment	(2B) Form the Team	(3B) Scope	(4B) Create a Collaborative Project Team Environment	(6B) Benefits Realization
Topic C	(1C) Project Benefits and Value	(2C) Build Shared Understanding	(3C) Schedule	(4C) Empower the Team	(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		

LESSON 2

# START THE PROJECT

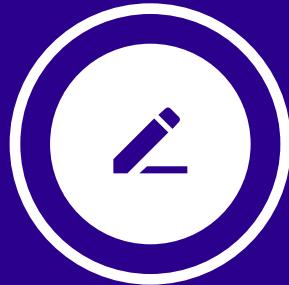
- Identify and Engage Stakeholders
- Form the Team
- Build Shared Understanding
- Determine Project Approach



# Learning Objectives

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- Define and discuss stakeholders and the most effective ways to communicate with them.
- Explain the best ways to form a team.
- Describe how to build the most effective understanding of a project and how doing so relates to executing a project successfully.
- Explain how predictive and adaptive project life cycles work; explain what a hybrid development approach is.
  - Decide which kind of development approach or life cycle is best suited for work.



# Identify and Engage Stakeholders

TOPIC A



# Stakeholder Register

	Name	Title	Internal / External	Project Role	Major Requirements	Expectations	Influence / Attitude
1	Eugene Lowe	CEO	Internal	Sponsor	Successful completion	On-time completion, successful partnerships	Champion
2	Oasestown Municipality		External	Government partner (liaison); funding contributor; owner of SLC site	Successful completion of facility and partnership;	Accountability	Supporter
3	Kara Black	Principal, Oases Architects	External	Partner, designer, specialist knowledge (conservation building)	Clear design brief, successful partnership	Fluid funding and communication, design autonomy	Champion
4	Josie Bynoe	Chair, BOD	Internal	Direct strategic local partnerships for Shawpe	Environmental sustainability of project work; "moral rights"	No damage to Oasestown conservation district or environs	Resistor
5	Helen Grey	Lead, business development	Internal	Product owner	High profile tenants, excellent community and conservation credentials	Organizational learning; leadership opportunity	Neutral
6	Hasan Persaud	VP of Business Development	Internal	Portfolio owner	Capacity for ongoing revenue	End-user in Phase 3	Neutral
7	Mandeep Chahal	VP of Finance	Internal	Budget controller	direct contact with funding partners	clear data	Neutral
8	Kei Leung	VP of Marketing	Internal	Marketing expert	elevation of brand	high quality tenants	Supporter
9	Tenants		External	Income source	bespoke spaces	high quality	Neutral
10	Contractors		External	Vendors - building	clear instructions, contract		Neutral
11	Oasestown local residents		External	Neighbors to project	Traffic and noise pollution management	no inconveniences	Resistor
12	Oasestown Community Partnership		External	Community group operating in Oasestown	none	a free space in the SLC	Champion

# Know Your Stakeholders

## Go Beyond Job Titles

Power	Level of authority
Interest	Level of concern about project outcomes
Influence aka <i>attitude or impact</i>	<ul style="list-style-type: none"><li>Ability to influence project outcomes or cause changes to planning or execution</li><li>Magnitude of potential contribution or disruption to project</li></ul> <p><i>Use a descriptive term — e.g., champion, supporter, neutral, detractor</i></p>



*Tailor stakeholder assessments to suit project needs. The goal of this exercise is to facilitate your planning of effective communication with the stakeholders!*

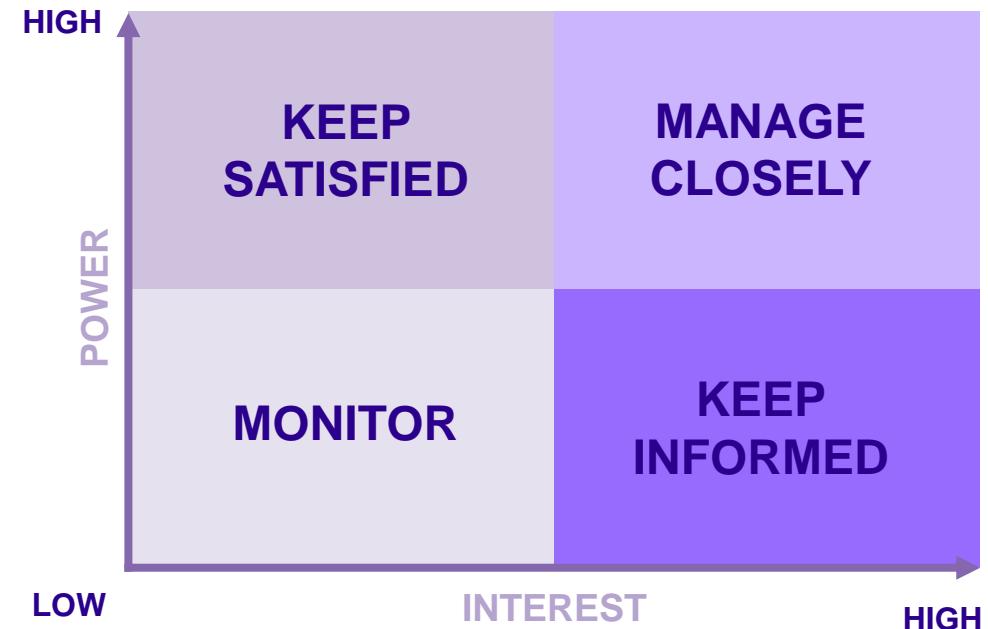
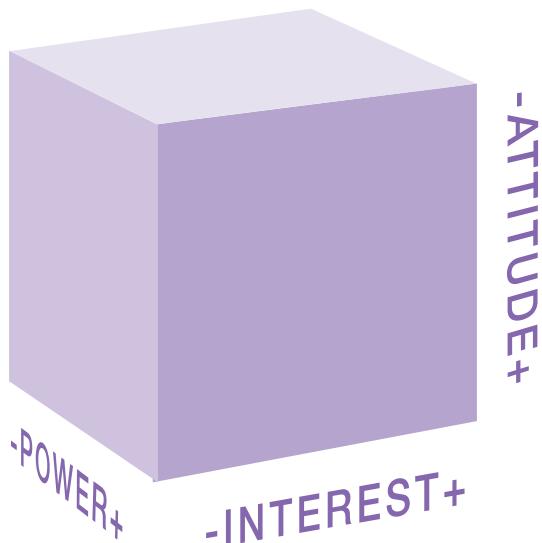
# Stakeholder Mapping



Use two dimensions to map stakeholders:

- Power and interest grid
- Power and influence grid
- Impact and influence grid

Or use three dimensions – a **cube** – to refine the analysis further!



## Method:

- Place each stakeholder on the grid (*do not use names*)
- Use the same quadrant labels, but change the axis labels

# Directions of Influence



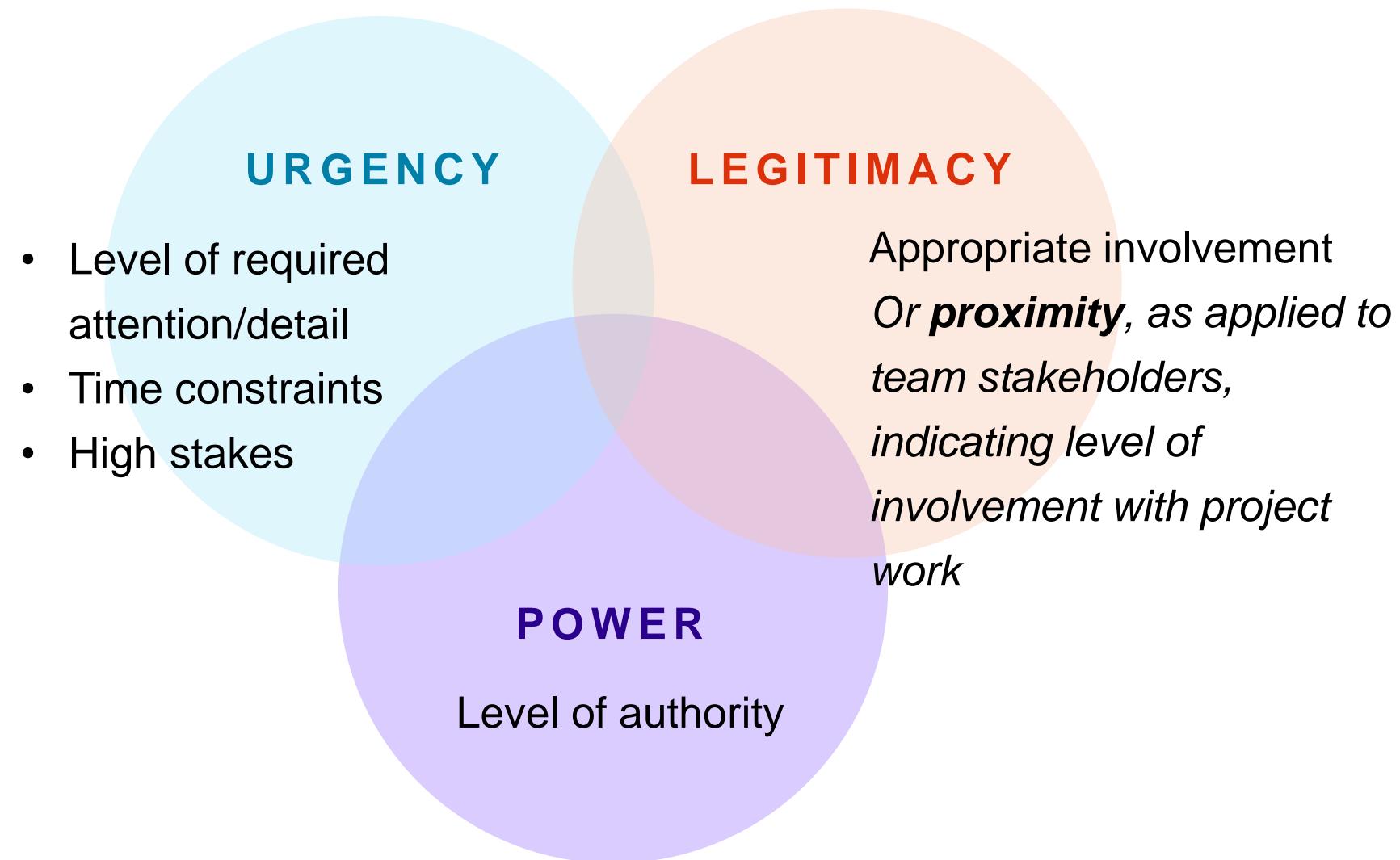
You should understand the social network of project stakeholders, specifically the direction of their influence on the project.

<b>Upward</b>	<i>Parent organization</i> — senior management (business, financial interests)
<b>Downward</b>	<i>In the project hierarchy</i> — team or specialists
<b>Outward</b>	<i>Have a “stake” in the project</i> — client, end-user, external
<b>Sideward</b>	<i>Friendly or competitive for resources</i> — project manager's peers, other organizational departments

# Salience Model



Focus on the **product owner** role. Are they familiar, interested and engaged enough with the project to make decisions and move the project forward?



# Stakeholder Perceptions

- Must be holistically understood in customer-centric project management approaches
- Can be damaging to a project, whether they are negative or positive



*Why do you think it's important to understand both positive and negative stakeholder perceptions of your project?*



# Capture Stakeholder Feedback and Perceptions



- *Interpersonal skills*
- *Active listening*
- *Emotional intelligence*
- *Effective communication methods*



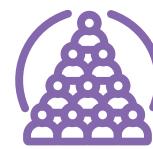
## Key stakeholders

- Interview to understand **project requirements and vision** and **communication preferences**



## All stakeholders

- Appropriate, regular project communications



## Large and public groups

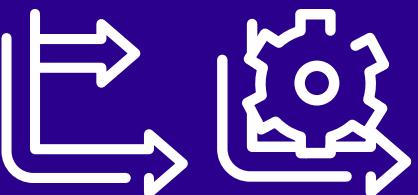
- Questionnaires/surveys
- Facilitated conversations/sessions — online or in person
- Digital media – email campaigns, websites, group chats
- Posters and advertising

# Plan to Communicate with Stakeholders

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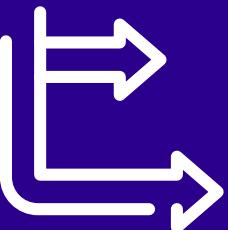
**Stakeholder engagement plan** identifies required management strategies to effectively engage stakeholders.

Team fulfills strategies via communications described in the **communications management plan**.



# Communication Requirements Analysis

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- Leads to a clear articulation of the stakeholders' communications needs
- Enables effective choices about communication topics, frequency, models and technologies
- Output is a grid, questionnaire or survey that documents the communication and technology requirements for each stakeholder

# Communication: Methods and Technologies



*Do you use any other communication methods or techniques on your projects?*

*Are there types your organization does not allow? Why?*

## Meetings/verbal

- Physical (face to face)
- Virtual (videoconferencing)
- Phone call

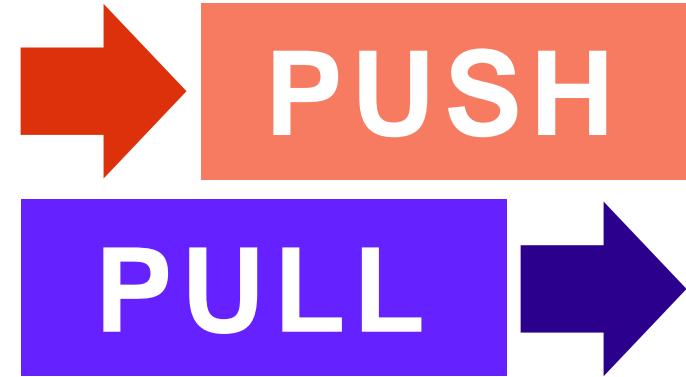
## Digital/electronic media

- Websites and social media
- Instant/text messaging via phone or platform
- Email or fax

## Physical

- Body language and gestures
- White boards

# Communication Methods



**Push** — sender determines:

- Send an email
- Make a phone call

**Pull** — receiver determines:

- Post information on team board
- Store reference documents in electronic repository — e.g., SharePoint

Interactive



- Conversation (speaking on the phone, virtual, in-person)
- Messaging
- Workshops/collaboration
- Whiteboarding



Agile teams are colocated whenever possible so that they can be highly collaborative.

# Communication Challenges / Considerations

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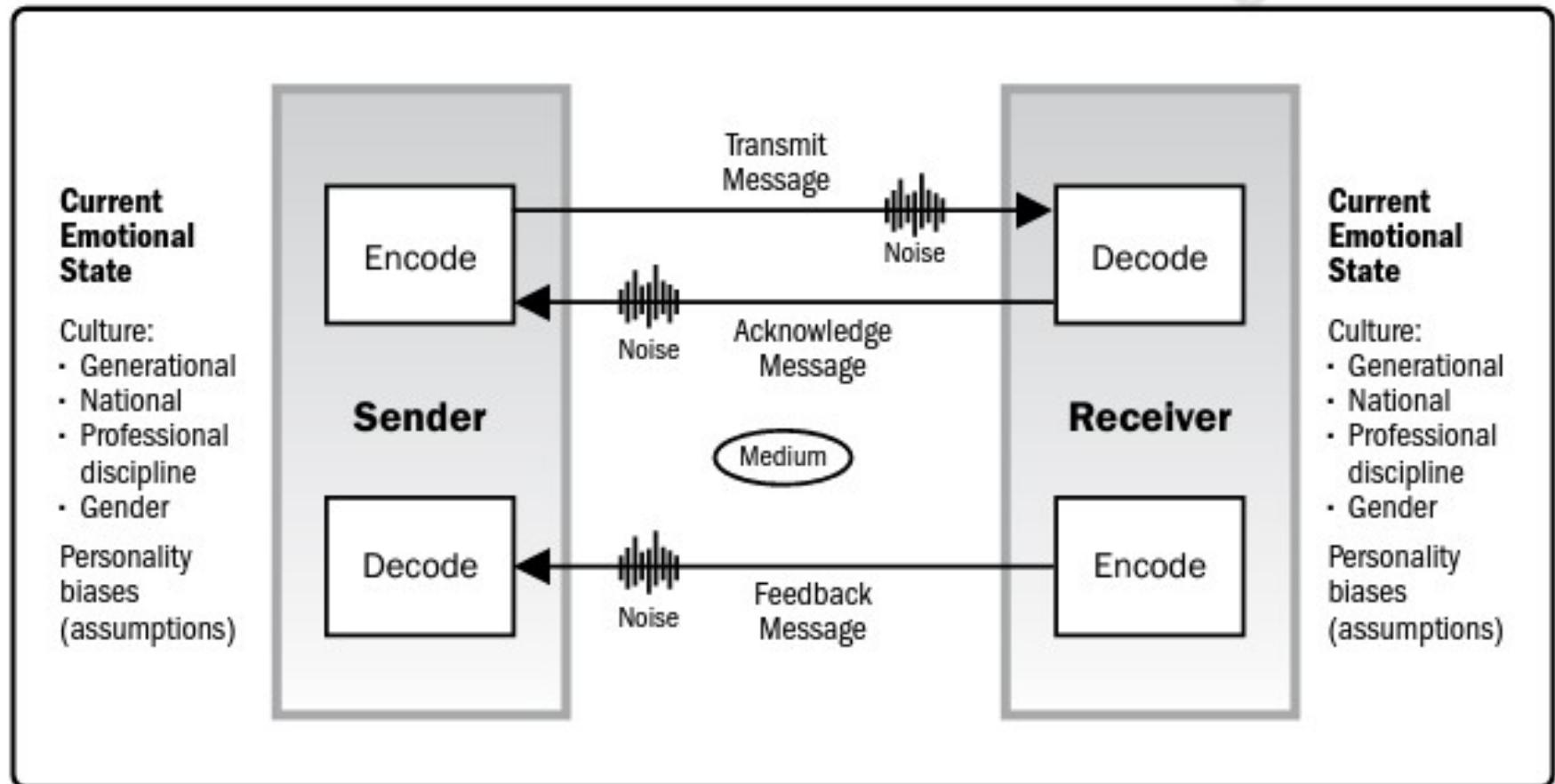
- Urgency of need for information
- Availability and reliability of technology
- Ease of use
- Project environment – e.g., language and formality
- Sensitivity and confidentiality of information
- Communications OPAs — e.g., social media protocols
- Data protection laws/regulations
- Accessibility requirements

# Communication Model\*



*Think of an example of a transmission. Depending on the method, what kinds of noise can play a part?*

## Cross-Cultural Communication Model



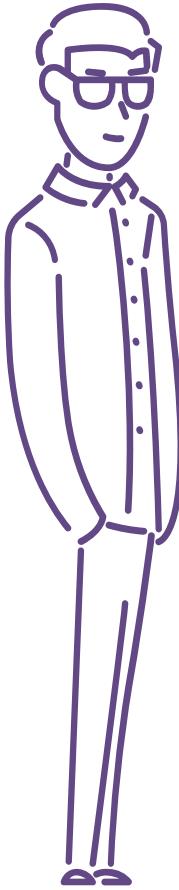
# Stakeholder Engagement Strategy



- **Involve** stakeholders
- **Enable** appropriate management strategies
- **Create** and **maintain** relationships



# Example Stakeholder Engagement Assessment Matrix (SEAM)



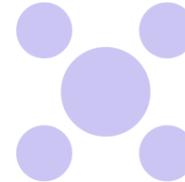
*Tailor labels for stakeholder levels of engagement to your context, team or organization.*

*Don't use names on the matrix – refer to stakeholders by number.*

Stakeholder	Unaware	Resistant	Neutral	Supportive	Leading
1				D	C
2				C	D
3			C	D	
4			C	D	
5		C	D		
6				C	D

**C** – Current engagement level | **D** – Desired engagement level

# ECO Coverage



## 1.9 Collaborate with stakeholders

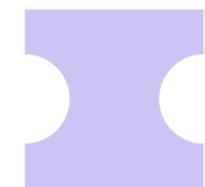
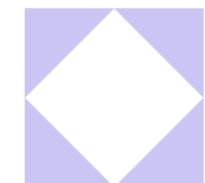
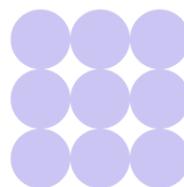
- Evaluate engagement needs for stakeholders (1.9.1)

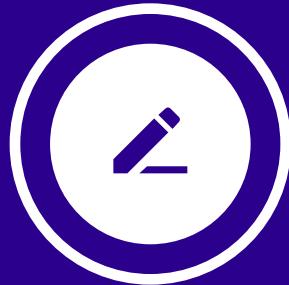
## 2.4 Engage stakeholders

- Analyze stakeholders (power interest grid, influence, impact) (2.4.1)
- Categorize stakeholders (2.4.2)
- Develop, execute and validate a strategy for stakeholder engagement (2.4.4)

## 2.2 Manage communications

- Analyze communication needs of all stakeholders (2.2.1)
- Determine communication methods, channels, frequency and level of detail for all stakeholders (2.2.2)





# Form the Team

## TOPIC B

# Create a Collaborative Team Culture



(Optional)

*How do you think a collaborative team culture can be created in a hybrid approach? Give some examples!*



Project manager:

- Builds team agreements, structures and processes that support a culture that enables individuals to work together and benefit from interactions
- Tailors a **resource management plan**
- The team assembles and self-organizes to support project requirements.

# Project Team Formation Video

## Tuckman's Ladder of Team Development

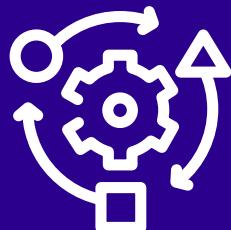
Dr. Bruce Tuckman



# Project Team Formation

## Key Concepts

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**Self-organizing team:** A **cross-functional team** in which people fluidly assume leadership as needed to achieve the team's objectives.

**Servant leadership:** The practice of leading the team by focusing on understanding and addressing the needs and development of team members in order to enable the highest possible team performance.

*These concepts can be applied in any kind of project team.*

# Project Manager Role in Adaptive Teams



Leadership and management models:

- **Centralized:** All team members practice leadership activities and accountability is usually assigned to one individual, such as the project manager or similar role (**team lead**).
- **Distributed:** One project team member (may shift) serves as facilitator to enable communication, collaboration and engagement on accountable tasks.



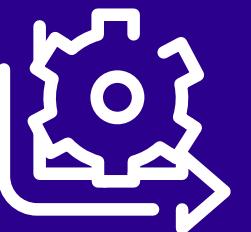
*If a team is self-organizing, is a project manager needed?*

- *If not, which of these models works best?*
- *If yes, what does that role look like?*

# Hybrid Team Formation

## Example

Centralized coordination by a project manager or team lead and self-organized project teams for portions of the work



# Project Team Composition

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- Refers to team's makeup and how team members are brought together
- Varies based on organizational culture, location and scope
- Can be full-time or part-time members
- Includes varied knowledge and expertise — i.e., generalists and specialists

# Project Team Roles

- Project management staff
- Project work staff
- Supporting experts
- Business partners



# Identify Project Resource Requirements

## Guidelines

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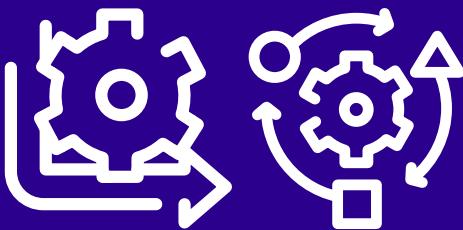
Provision team members, external contractors and suppliers and physical and intangible assets:

- Ensure relevant skill sets
- Avoid single points of failure — e.g., a single resource has a required skill
- Create **cross-functional teams**
- Use **generalizing specialists**, or **T-shaped** people, whenever possible to support other areas of the project
- Ensure appropriate physical resources and other requirements — e.g., equipment and access rights



# T-Shaped People and Self-Organizing Teams

- Provide individual value and versatility on project teams
- Lend flexibility to organizations
- Help avoid key resource shortages or work stoppages due to availability
- Train and coach team members to become T-shaped, combining **breadth** and **depth** of knowledge



# Experts and Expert Judgment

People from other areas of the organization

- Consultants
- Stakeholders
- Professional and technical associations
- Historical data
- Project manager



# Focus on Team Strengths

- Organize around team **strengths**
- Be aware of **weaknesses**
- Identify **threats** to team success and **opportunities** to improve team performance



SWOT analysis



# Team Norms

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- Together, **establish** expected team behaviors **at the beginning of the project**
- Enable teams to **handle challenges** later
- Include guidelines and techniques for:
  - Meetings
  - Communications
  - Conflict management
  - Shared values
  - Decision-making
- Align team values with the *PMI Code of Ethics and Professional Conduct*

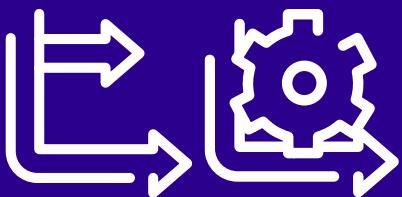
# PMI® Code of Ethics and Professional Conduct



*Can you remember the four values  
that drive ethical conduct for the  
project management profession?*



# Team Charter\* and Ground Rules\*



- A document – electronic or paper, or a poster of the ground rules
- Created together with the team
- Includes:
  - Shared values
  - Behavior guidelines
  - Guidelines for communications and use of tools
  - Decision-making guidelines
  - Performance expectations
  - Conflict-resolution measures
  - Meeting time, frequency, and channel
  - Other team agreements — e.g., shared hours, improvement activities

# Team Charter Example



**PROJECT TEAM NAME:** SHAWPE LIFESTYLE CENTRE  
**SPONSORING BUSINESS UNIT:** EXECUTIVE / EUGENE LOWE  
**DURATION OF CHARTER:** 36 MONTHS  
**# OF PROJECT TEAM MEMBERS:** 12  
**TEAM MEMBER TIME COMMITMENT:** 40 HOURS PER WEEK  
**SCOPE OF WORK:**

- Construct bespoke interior spaces appropriate for commercial tenants
- Restore historic buildings in site district for use as community spaces
- Recruit commercial and community tenants
- Create management structure and transfer to Oasestown Municipality partner

#### PROJECT TIMELINES AND KEY MILESTONES:

Milestone	Due Date	Measured By
PHASE 1	DEC 20XX	<ul style="list-style-type: none"><li>Completion of interior spaces – obtain "safe occupancy" certificate</li><li>Recruit tenants</li></ul>
PHASE 2	DEC 20XX+1	<ul style="list-style-type: none"><li>Tenants move in</li><li>Completion of outdoor spaces</li></ul>
PHASE 3	DEC 20XX +2	<ul style="list-style-type: none"><li>Transferral of property management service</li></ul>

**ADMINISTRATIVE/REPORTING REQUIREMENTS:** All parties report directly to project manager

#### RESOURCES and BUDGET:

- Shawpe employees report to functional managers and project manager
- External contractors refer to SOW, report to project manager

#### PROJECT TEAM

**Project manager:** Ang Fen

**Product owner:** Helen Grey

#### TEAM MEMBERS:

- |                            |                            |
|----------------------------|----------------------------|
| • Daniel Ayan, Finance     | • Luis DeSouza, Executive  |
| • Greer Inniss, IT         | • Bei Jones, Marketing     |
| • Janis Feather, Marketing | • Solomon Grant, Marketing |
| • Kareena Ayoung, Bus Dev  |                            |



- Project Team Executive Sponsor Roles and Responsibilities:**
  - Guide the project team to fulfill goals
  - Ensure all team members are fully oriented about the project vision at kickoff meeting.
  - Work with the project manager to ensure group work is carried out.
- Project Manager Roles and Responsibilities:**
  - Guide the team in accomplishing the purpose detailed in the charter and in accordance with company policies.
  - Keep the team focused.
  - Work toward building a sense of trust, productivity, and camaraderie within the group.
  - Support a forum for open discussion and sharing of ideas.
  - Address non-productivity within the group.
  - Make decisions to support accomplishing the objectives of the team.
  - Coordinate all administrative duties in support of the group.
  - Facilitate information gathering for meetings.
- Project Team Member Roles and Responsibilities:**
  - Collaborate as a team to follow all process and procedures to complete the work of the team.
  - Ensure individual work for the team is carried out between meetings.
  - Collaborate with project manager and product owner on an as-needed basis.
  - Actively participate in team meetings.
- Team Guidelines and Communication**
  - Working hours are 8am – 5pm for the office
  - On site working hours are posted on site and change daily; use security ID badges to enter site at any hour; hard hats and boots must be worn on site
  - Be polite
  - Respect everyone's opinion
  - Speak to people directly and appropriately before airing grievances in public
  - People may be contacted outside of working hours, but they are not required to respond
  - Use relevant messages in work chats
  - Be on time to meetings
  - Ask for help when you need it
  - Communicate honestly and openly
  - Use email for essential communication, so read emails properly

## GROUND RULES

# Team Communication

- **Effective communication** includes:
  - Verbal
  - Written
  - Behavioral
  - Physical (notice boards)
  - Virtual
- Include communication expectations and details in the **team charter**
- Organize communications:
  - Facilitate team and stakeholder collaboration
  - Manage expectations
  - Check regularly to make sure it's working!
  - Plan and use **retrospectives** to discuss communications improvements

# Colocated, Virtual or Both?



*What kind of team are you on?*



## Virtual Team\*

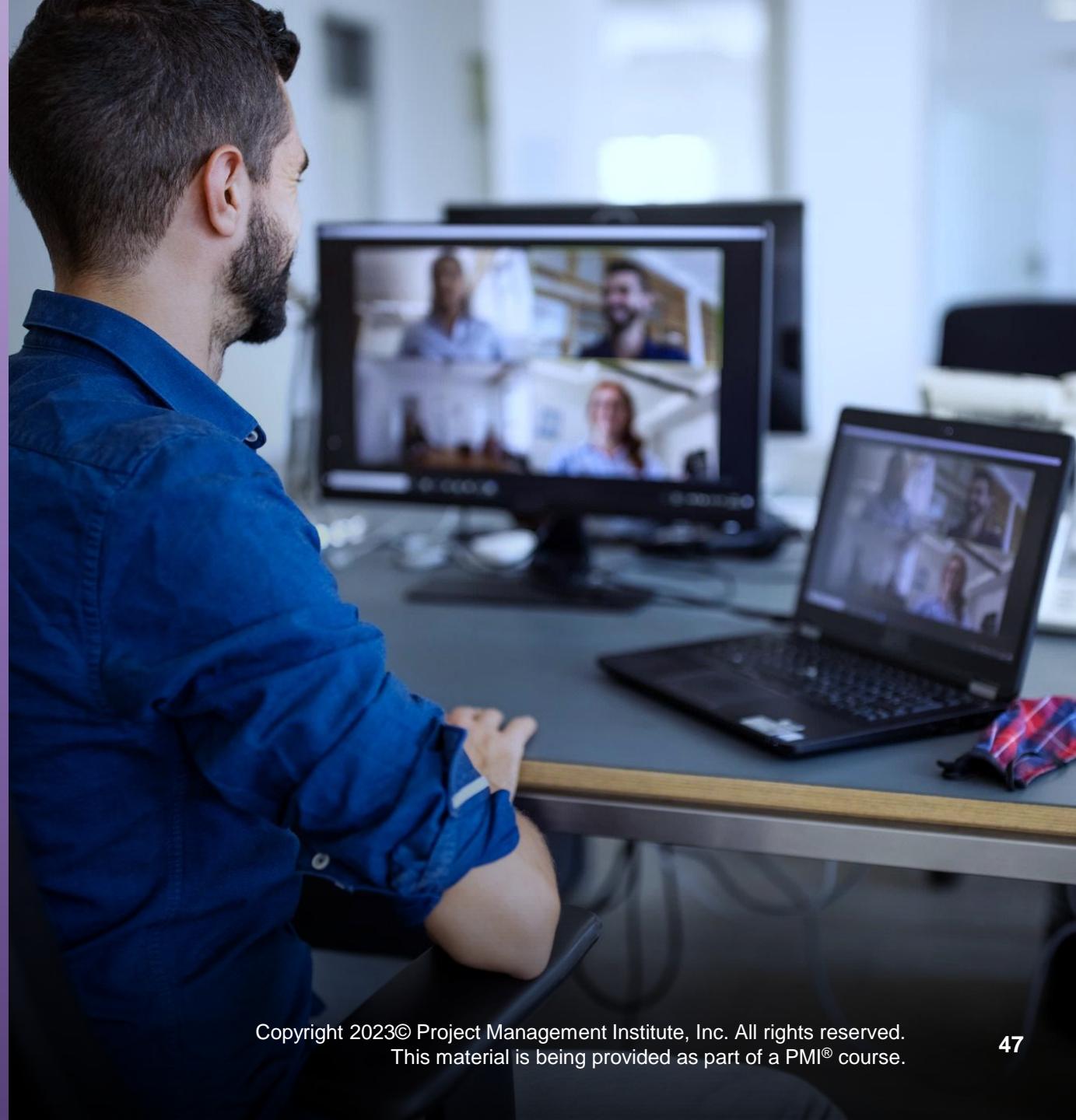
- “Normal” in most workplaces
- Create opportunities for the organization:
  - Better skills at lower costs
  - Avoids relocation expenses
  - Work/life balance
- Rely on communication technology
- May have bonding challenges

## Colocated Team\*

- Interaction is easy
- Better bonding is facilitated
- Use of physical tools, collaboration and boards possible

# Virtual Team Challenges

- Individual performance tracking
- Diversity - language, technological skill
- Solo working prohibits bonding



# Running Virtual Teams

- Check in with people individually as often as possible
- Conduct positive network-building activities



What are your tips for creating a positive virtual team experience?



# Virtual Team Communication Technology



- Plan team communication and collaboration methods
- Consider working hours, geographical dispersion and security requirements
- Use appropriate tools:
  - Task boards
  - Messaging and chat
  - Calendars
  - Document storage
  - Knowledge repositories
  - Videoconferencing

# Address Virtual Team Member Needs

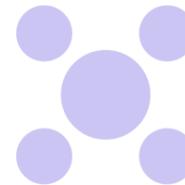
Facilitate and ensure collaboration as a priority

Address the basic needs of a virtual team, including:

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



# ECO Coverage



## 1.4 Empower team members and stakeholders

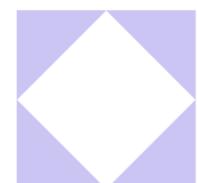
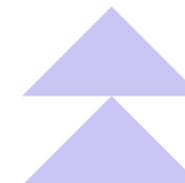
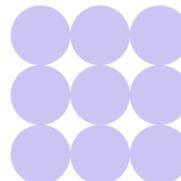
- Organize around team strengths (1.4.1)

## 2.16 Ensure knowledge transfer for project continuity

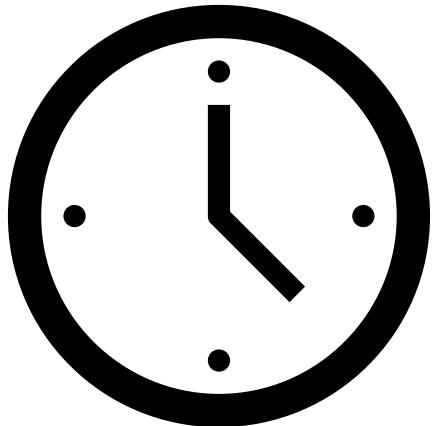
- Discuss project responsibilities within team (2.16.1)
- Outline expectations for working environment (2.16.2)

## 1.11 Engage and support virtual teams

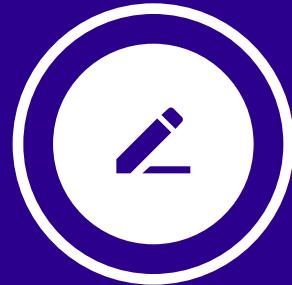
- Examine virtual team member needs (e.g., environment, geography, culture, global, etc.) (1.11.1)
- Investigate alternatives (e.g., communication tools, colocation) for virtual team member engagement (1.11.2)



# 1-Hour Break!



**See you back after one  
hour!**



# Build Shared Understanding

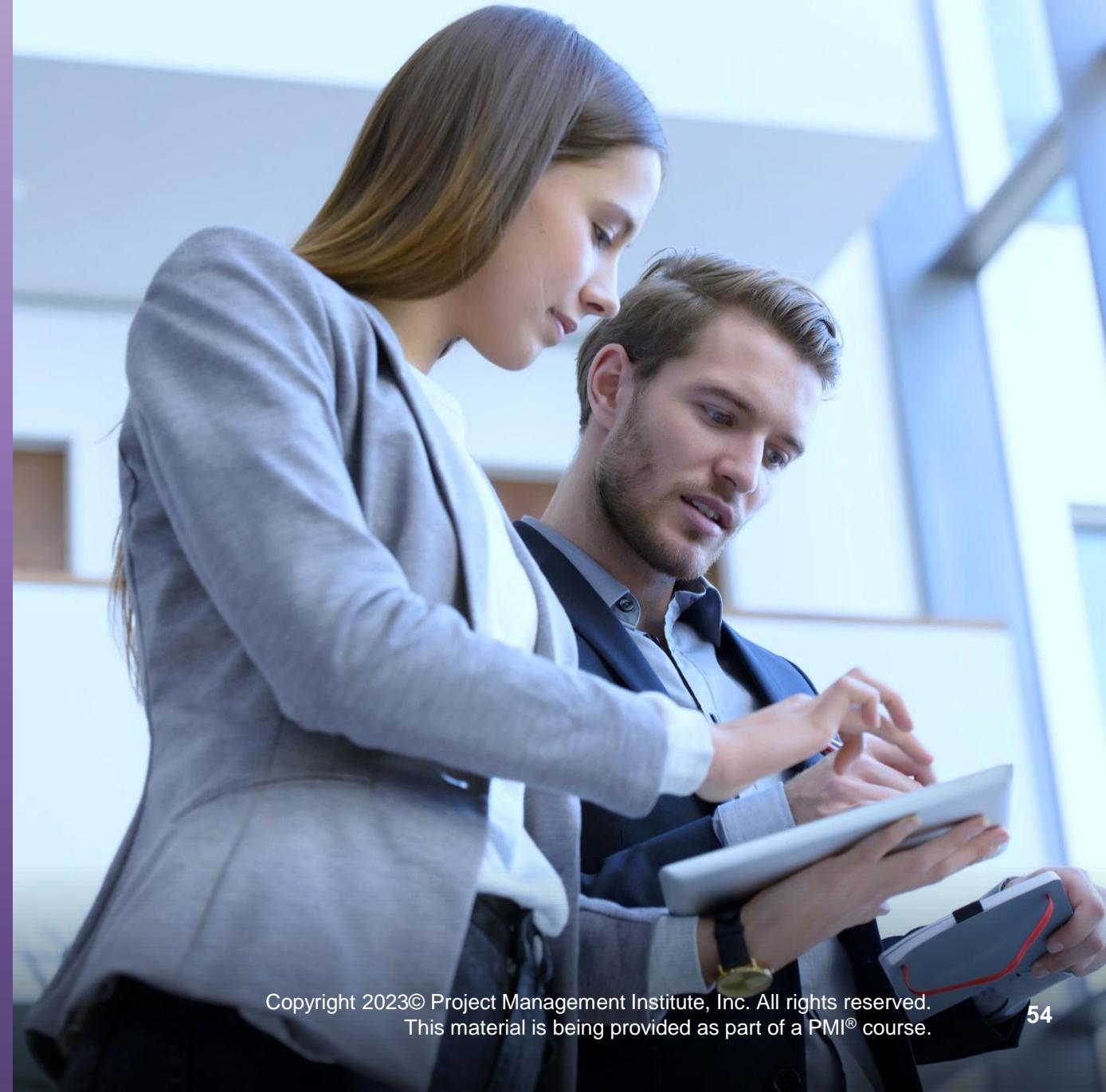
## TOPIC C

# Seek Consensus for the Project Among the Team and Stakeholders

- Demonstrate leadership behaviors
- Focus on value
- Be a diligent, respectful and caring steward
- Navigate complexity
- Embrace adaptability and resiliency

Create artifacts:

- Project charter
- Project vision statement



# Building a Shared Understanding

## Guidelines

- 
- **Share** the project agreements (vision statement and project charter) with stakeholders and the team
  - **Agree or negotiate** to reach agreement and “buy-in”:
    - Project agreements — stakeholders
    - Roles and responsibilities, priorities and assignments — team
  - **Uphold** the agreements throughout the project



*Use open and reliable communication methods and your leadership “power skills”*

# Project Vision Statement

---

- Created by project sponsor or executive
- Includes a **clear vision of the desired objectives and alignment with the organization's strategic goals**
- Refer to it throughout the project to maintain alignment

# Holistic Understanding of the Project

## Negotiation Goals

---

### First, find out...

- The boundaries of negotiation for the project agreement
  - What, if anything, is eligible for discussion or troubleshooting
- The desired objectives of the project

### Then:

- Apply critical thinking and business acumen
- Discover how the project fits in the organizational landscape and business objectives

# How to Create a Holistic Understanding of the Project

---

- Ask **stakeholders** to elaborate and clarify their vision or inputs, including asking the sponsor to clarify the vision statement!
- Existing **agreements** may contain initial intentions for, or describe, a project:
  - Contracts with external parties
  - Memorandums of understanding (MOUs)
  - Service-level agreements (SLAs)
  - Letters of agreement or intent
  - Verbal agreements
  - Communication (especially emails) between key stakeholders
  - Statements of work (SOW)

# Refer to Business Case and Business Needs

## **Business case:**

- A documented economic feasibility study
- Establishes benefits of project work
- Provides a basis for authorization of further project activities

## **Business needs documents:**

- Identifies high-level deliverables
- A prerequisite of a formal business case
- Describes requirements — what needs creating and/or performing

# Negotiate and Agree on Project Success Criteria

- Interview **stakeholders**
- Gather **expert judgment** on technical success criteria
- Check:
  - Organizational (program, operations) **key performance indicators (KPIs)**
  - Lessons learned and historical data
  - Quality policy
  - User acceptance testing (UAT) requirements



- *Reporting and verification criteria for objectives*
- *Identification of deliverable and objective **acceptance criteria** for each*



- *A **definition of done (DoD)** may be specified for the project, in addition to iteration outputs*

# Help Everyone Understand the Vision Guidelines



- Use interpersonal and leadership “power skills” and open communication channels with stakeholders and team members
- Get creative with agile methods!
  - A **product box exercise** to internalize the vision from the customer’s point of view and emphasize product/project value
    - **Example:** Here is why Oasestown residents will choose to spend their time and money at SLC (*followed by explanation of what it offers to customers*)
  - The **XP metaphor** technique explains a complex idea in simple, familiar terms, using common language and vocabulary
    - **Example:** SLC is the living room of Oasestown!

# Got Agreement on the Project Agreements?



*There is no single way to create a **project charter**, but every project needs to have one!*



# Project Charter\*

---

## What it does and why it's important:

- Authorizes project
- Enables project manager to apply resources to project work
- Defines rationale and business need
- Verifies alignment with strategic goals
- Keeps everyone focused on a clear project vision



*Usually created by project sponsor or project manager with executive/stakeholder approval. Sometimes a statement of work can serve as project charter.*



# Project Charter

## Contents

---

### What's included:

- **Names** - project sponsor, project manager, key stakeholders
- **Project description**, including preliminary requirements, measurable objectives
- **Business needs**, including financial goals or milestones
- Summary **schedule** and **milestones**
- **Assumptions, boundaries and constraints**, including overall risk, approval requirements and approved budget
- Information from the **business case**, including success and exit criteria

# Project Charter: Example



## PROJECT CHARTER

PROJECT NAME	PROJECT MANAGER	PROJECT SPONSOR
Shawpe Lifestyle Center (SLC)	Ang Fen	Eugene Lowe

EMAIL	PHONE	ORGANIZATIONAL UNIT
ang.fen@shawpe.com	000.000.0000	Executive

ESTIMATED COSTS	EXPECTED SAVINGS	EXPECTED START DATE	EXPECTED COMPLETION
\$10 Million	\$0	Jan 20XX	Dec 20XX+2

## PROJECT OVERVIEW

PROBLEM OR ISSUE	Rehabilitate commercial property in downtown Oasestown
PURPOSE OF PROJECT	Establish a profitable commercial development and community partnership in Oasestown
BUSINESS CASE	Attached. Approved by E. Lowe and BOD at Oct 20XX meeting.
GOALS / METRICS	Building code and other local government compliance with historic district construction
EXPECTED DELIVERABLES	"Rehabilitate 128,000 sq metre indoor/outdoor space to meet municipality standards and compliance with National Heritage & Conservation Board (NHC) standards / Property management entity established with Oasestown partner / Secure 14-18 highly reputable commercial tenants"
RISK - CONSTRAINTS, ASSUMPTIONS	1. Site in historical conservation zone 2. New vendors for specialist glasswork and masonry 3. Physical retail market stability 4. Resistant key stakeholder 5. Phase 3 financing dependent on success of Phases 1 and 2"

## PROJECT SCOPE

WITHIN SCOPE	1. Manage construction contractors and site development 2. Create marketing and advertising to secure 14-18 high-quality tenants to anchor commercial space; 3. Work with community partners to establish socially beneficial community spaces and programs 4. Manage project budget (funded by external grant) within compliance
OUTSIDE OF SCOPE	1. architectural work - interior and exterior - Oases Architects 2. building work - XYZ General Contractors, ZYX specialist contractors 3. External grant fund management

## TENTATIVE SCHEDULE

KEY MILESTONE	START	FINISH
Form Project Team / Preliminary Review / Scope	00/00/0000	00/00/0000
Finalize Project Plan / Charter / Kick Off	00/00/0000	00/00/0000
Phase 1 Design and build interior	00/00/0000	00/00/0000
Create contract with community groups	00/00/0000	00/00/0000
Recruit 14-18 tenants	00/00/0000	00/00/0000
Phase 2 Design and build outdoor spaces	00/00/0000	00/00/0000
Install community programs	00/00/0000	00/00/0000
Secure \$5M revenue in annual commercial rents	00/00/0000	00/00/0000
Phase 3 Finalize all construction	00/00/0000	00/00/0000
Train SLC property management staff	00/00/0000	00/00/0000

# Kickoff Meeting

---

## Purpose

- Establishes project context
- Assists in team formation
- Aligns team and stakeholders with project vision

## Organizational/Public

- Announce project initiation
- Share understanding of high-level vision, purpose and value
- Identify sponsor, key stakeholders and project manager
- Include high-level items from the project charter

## Internal/Team – *held after agreements are finalized*

- Give project charter overview
- Clarify team member roles and responsibilities (may include the initial team charter)



- Present results of planning efforts

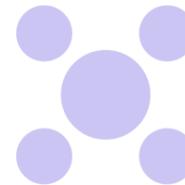


- Initiate product backlog



- Present product roadmap

# ECO Coverage



## 1.2 Lead a team

- Set a clear vision and mission (1.2.1)

## 1.8 Negotiate project agreements

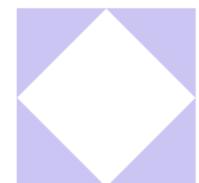
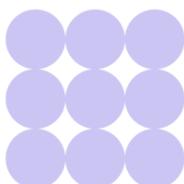
- Analyze the bounds of the negotiation for agreement (1.8.1)
- Assess priorities and determine ultimate objective(s) (1.8.2)
- Participate in agreement negotiations (1.8.4)
- Determine a negotiation strategy (1.8.5)

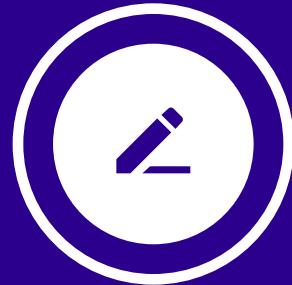
## 1.10 Build shared understanding

- Survey all necessary parties to reach consensus (1.10.2)
- Support outcome of parties' agreement (1.10.3)

## 1.12 Define team ground rules

- Communicate organizational principles with team and external stakeholders (1.12.1)
- Establish an environment that fosters adherence to ground rules (1.12.2)





# Project Approach

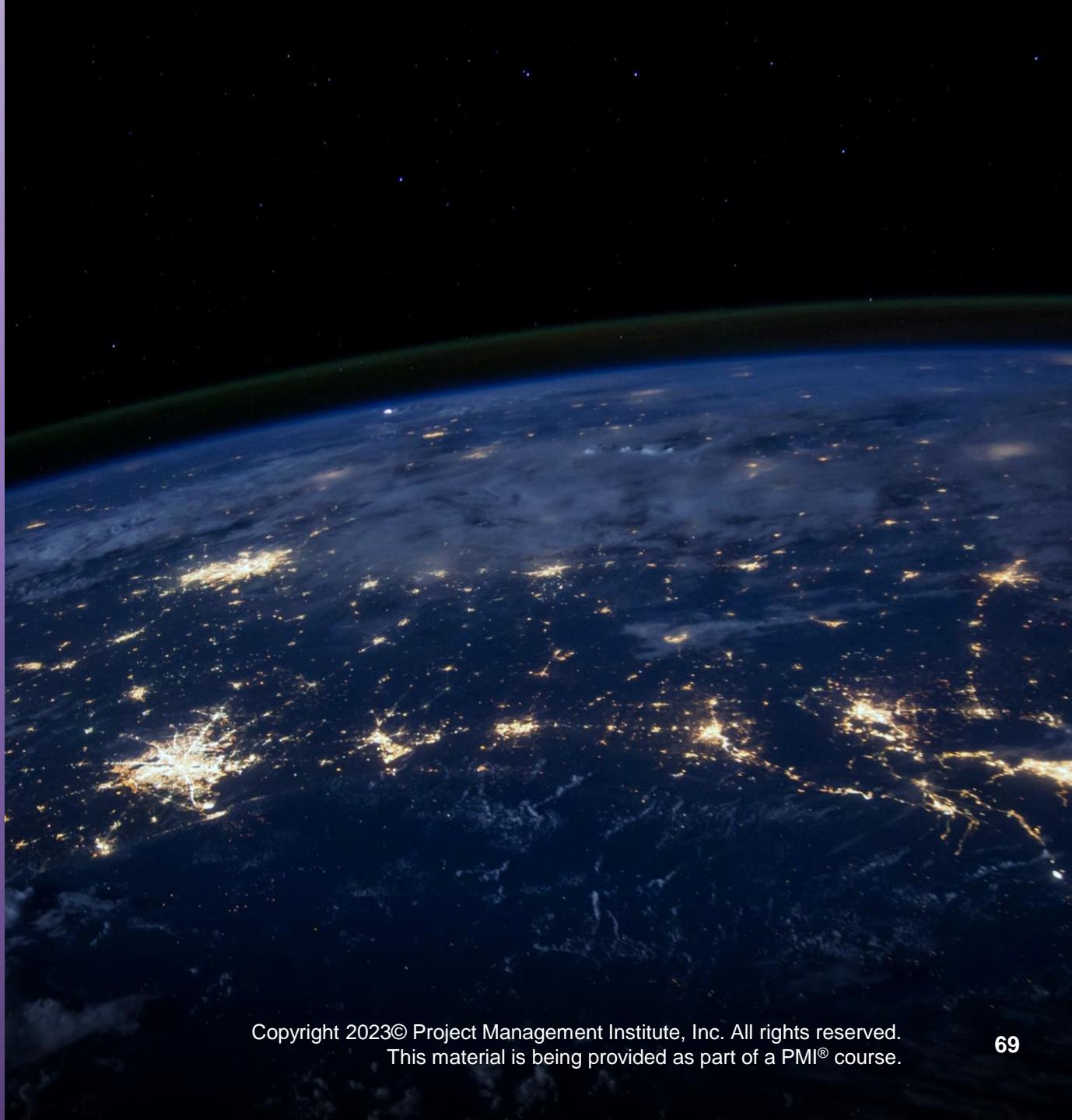
## TOPIC D

# First, Understand How and Why Approaches Differ

- Changing perceptions of value — e.g., sustainability, customer-centricity
- Dynamic and perpetual global change
- Increasing complexity and risk
- Need to innovate and be dynamic



*Which project management frameworks do you use?  
Do you have a preference?*



# Tailored Development Approaches

- Support **dynamic work environments**
- Discover **value delivery requirements** early
- Put stakeholders and the team in close collaboration

## Advantages:

- Provide better feature or capability assessment — continuous improvement and quality
- Improve organizational tolerance for change



*Servant leaders influence projects and encourage the organization to think differently.*

# Project Management Development Approaches

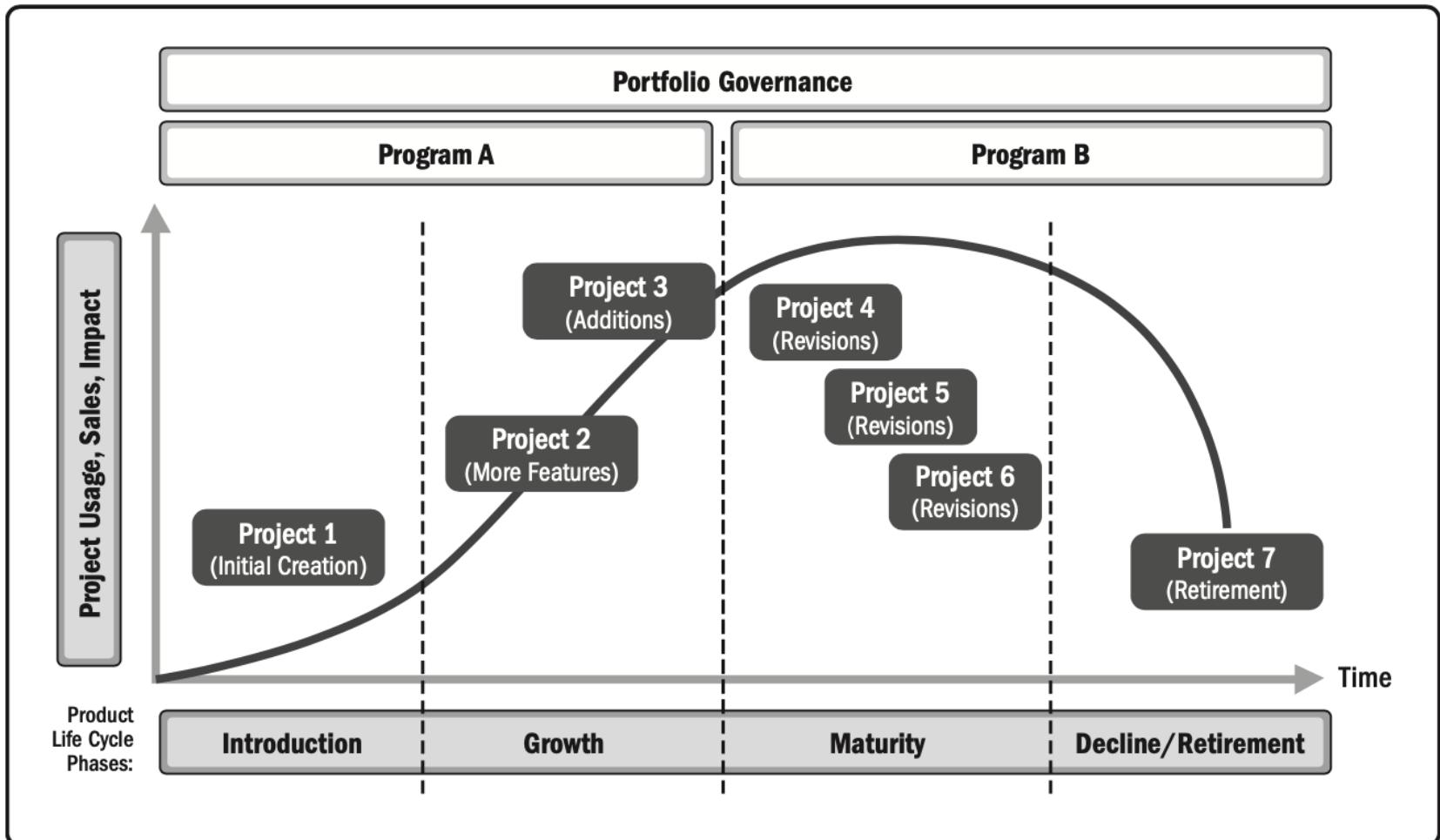
Characteristics	Certainty About Requirements	Change and Risk
 <ul style="list-style-type: none"><li>• Plan-driven</li><li>• Linear sequence of activities, in phases</li><li>• Phase completion governed by phase gates</li></ul>	High, from beginning	<ul style="list-style-type: none"><li>• Change possible, but controlled</li><li>• Risks carefully studied and managed</li></ul>
 <ul style="list-style-type: none"><li>• Change-driven</li><li>• Iterative or incremental</li><li>• Timeboxed cadence (iterations/sprints) or continuous flow</li></ul>	Unclear or customer-driven, so needs further discovery	<ul style="list-style-type: none"><li>• Built on assumption of high degree of change</li><li>• High tolerance of risk with guardrails for risk management</li></ul>
 Tailored development approach, combining these elements		

# Project or Product?

A product is part of a project; products have their own **life cycles**.

**Product management** represents a **key integration point** within program and project management.

**Product owners** are responsible for maximizing the value of the product and accountable for the end product.

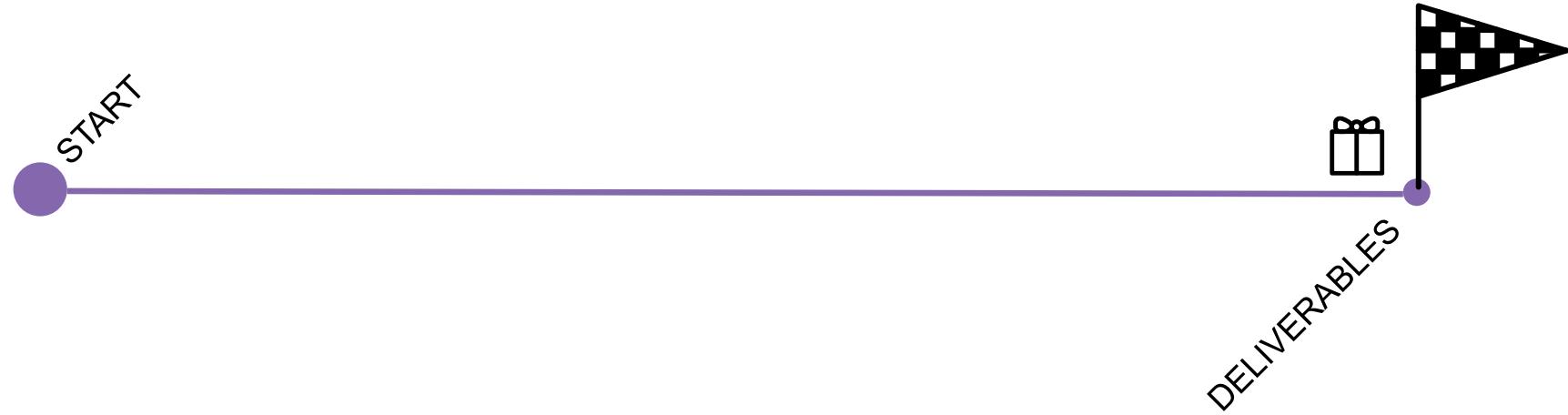


*Can you explain why projects often have both a project manager and a product owner?*

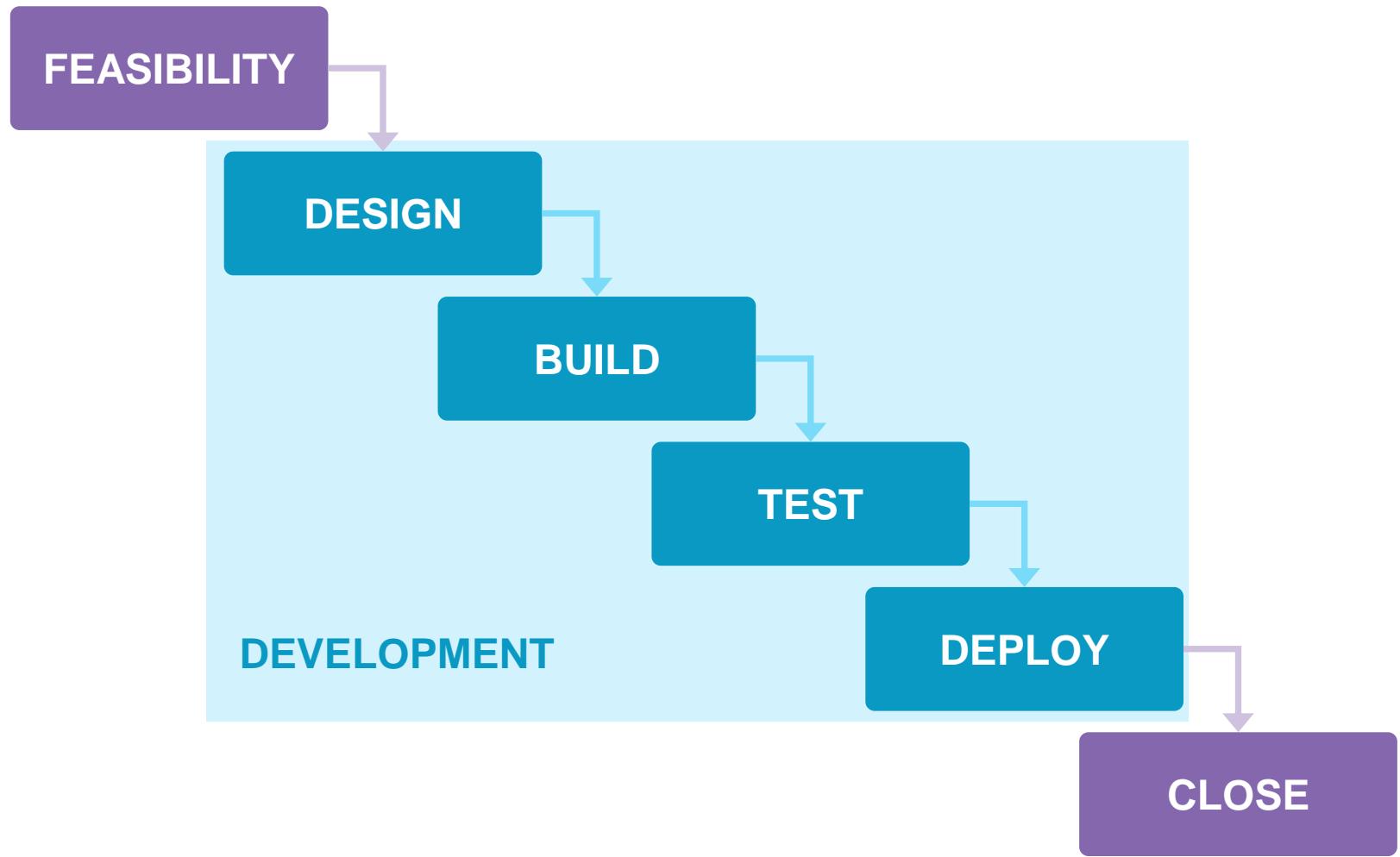
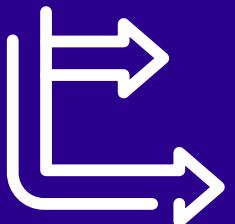
# Life Cycle and Development Approach



*Which type of life cycle is depicted here?*



# Predictive Life Cycle Visual

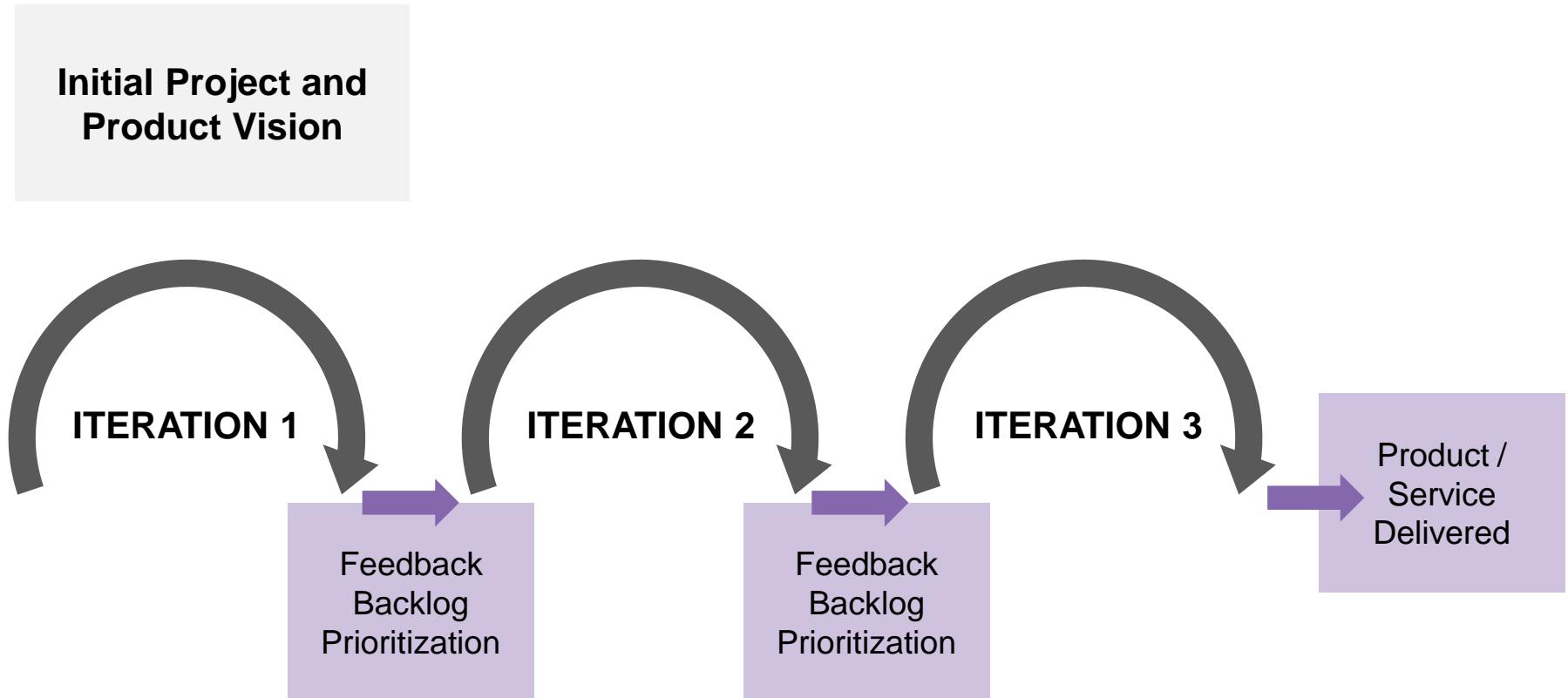
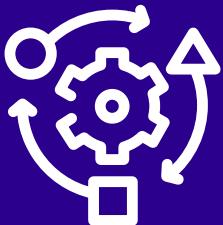


# Adaptive Life Cycle

## Example



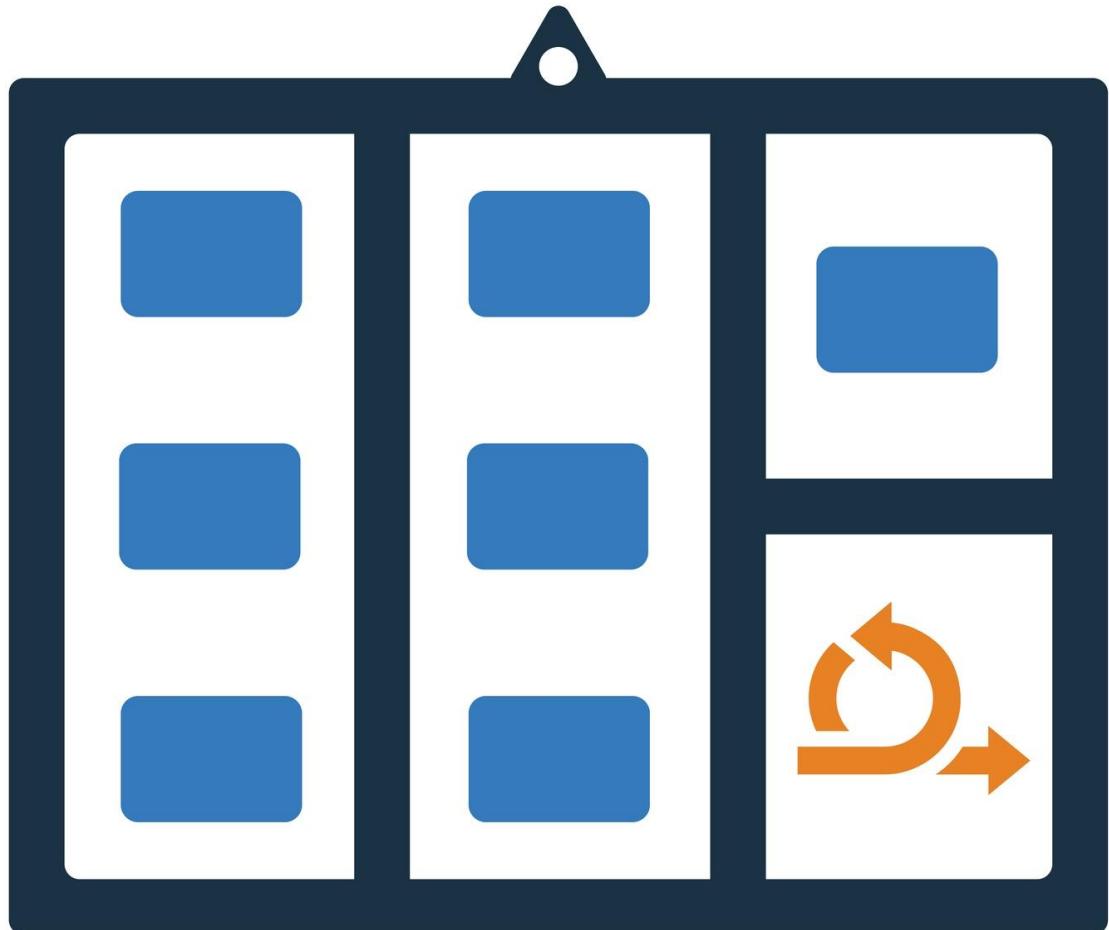
Note the *iterations* on the graphic, then describe how this life cycle uses an *incremental* approach.



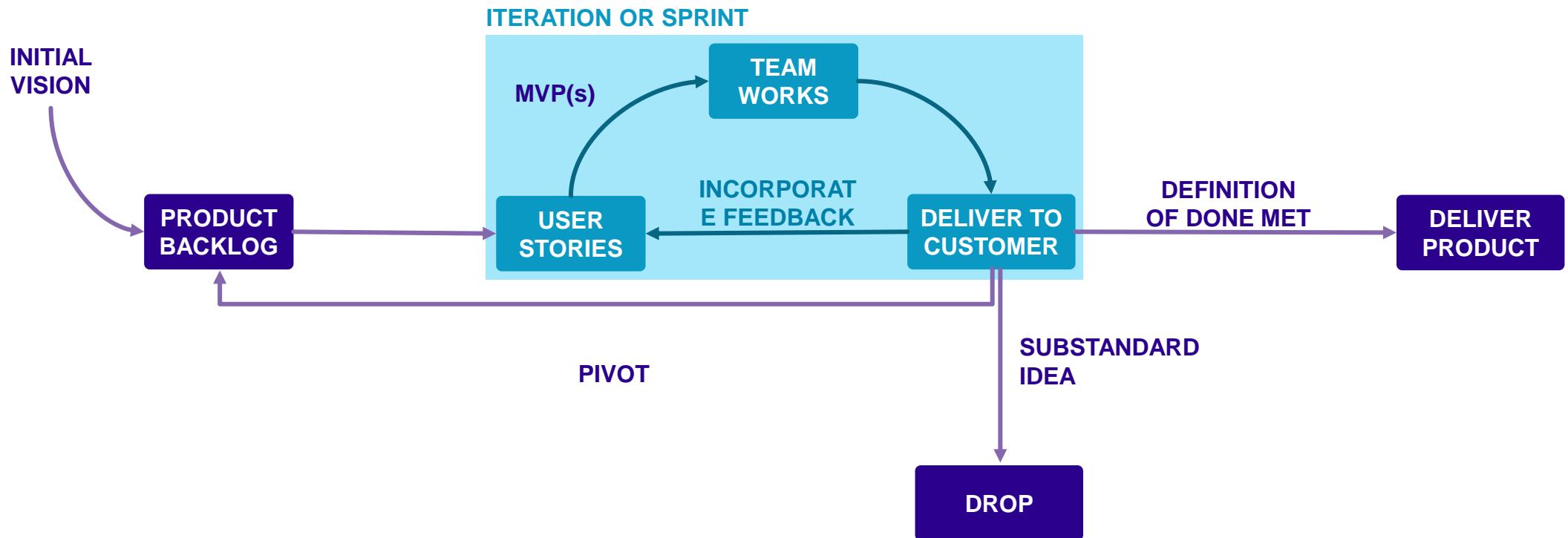
# Cadence

Refers to the timing and frequency of delivery of project deliverables.

- **Single:** One delivery at the end of the project
- **Multiple:** Delivery separated into parts, not necessarily sequentially
- **Periodic:** Like multiple deliveries, but on a fixed schedule — e.g., monthly or bimonthly



# Adaptive Development Approaches



*Cadence can be time-boxed with sprints/iterations or a continuous flow.*

# Development Approach and Life Cycle Terminology

## Quiz

- Deliverable
- Development approach
- Phases
- Life cycle



Project professionals use a development approach or method, which can be predictive, iterative, incremental, adaptive, or hybrid, to create and evolve a deliverable, which is a unique and verifiable product, result, or capability to perform a service.

A project passes through a series of logically related activities, called phases from its start to its completion. This entire process is called a life cycle.

Acceptance of a deliverable is required to complete a process, phase, or project.

# Hybrid Life Cycle and Development Approach

---



- Accomplished by tailoring
- Combines adaptive and predictive life cycles and/or development approaches
- Useful when requirements are uncertain or risky
- Also useful when deliverables can be modularized, or when deliverables can be developed by different project teams
- Uses iterative and incremental development

# Hybrid Project Approaches: Examples

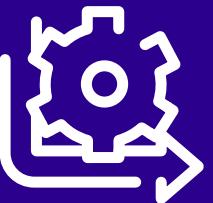
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- Use agile or iterative practices within a predictive framework
- Use predictive artifacts or processes within an adaptive life cycle
- Business analysis techniques assist with requirements management
- New tools help identify complex elements in projects
- Organizational change management methods prepare for transitioning project outputs into the organization

# What Can Be Tailored?

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- Project life cycle
- Development life cycle components
- Way of working (WoW)
- Knowledge management
- Change management
- Project governance
- Benefits management

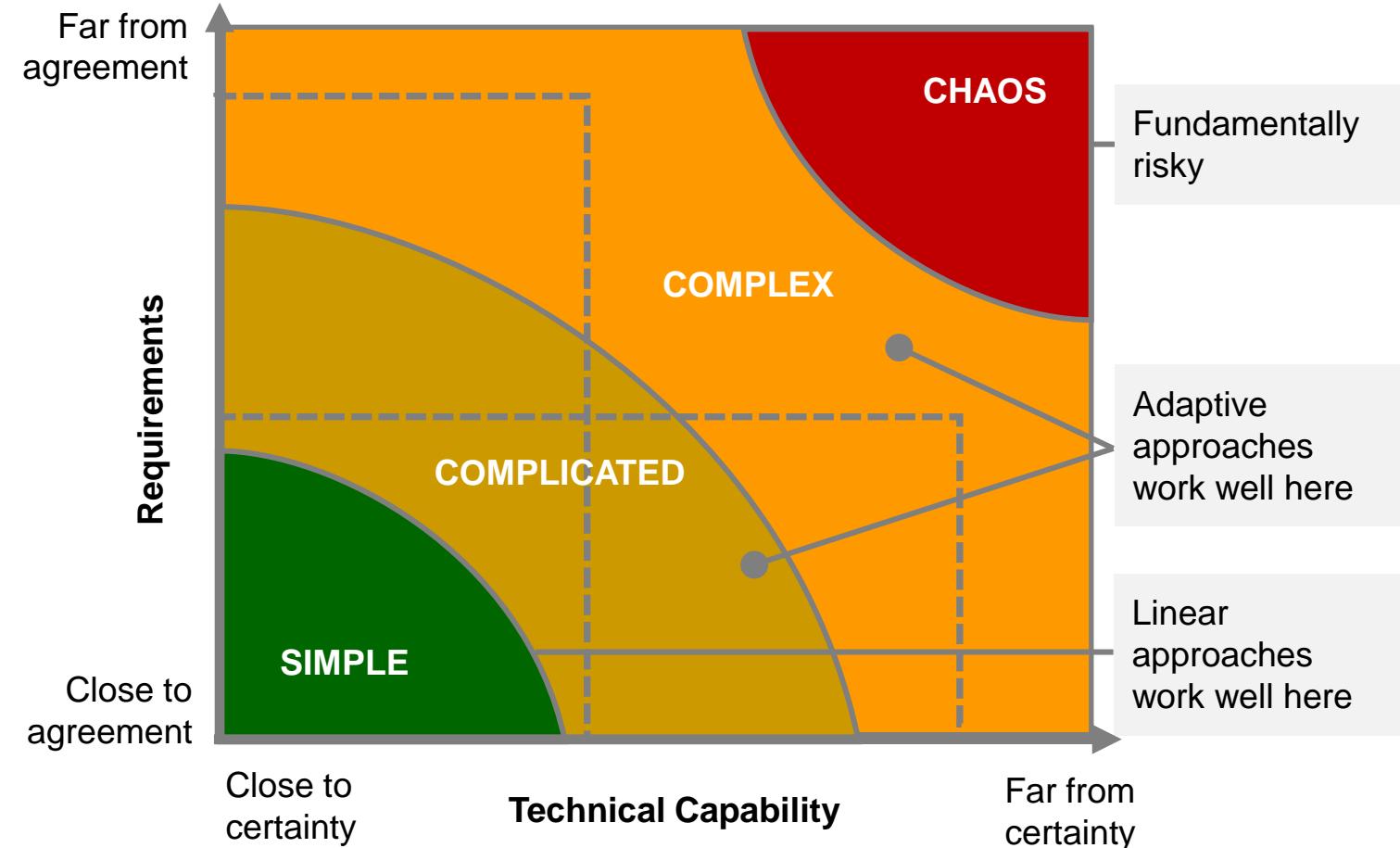
# Development Approaches

## Guidance and Probing Questions

- 
- Deliverable type and the **development approach** influence the **number and cadence** for project deliveries.
  - The development approach and the desired delivery cadence determine the **project life cycle** and its **phases**.
  
  - How much unplanned work?
  - How does the team prefer to work?
  - What cadence suits our work?
  - What does the customer want? Is incremental value delivery even important to them?
  - What's our schedule? Do we want a steadier, building approach or a faster pace?
  - What's our risk appetite/threshold?
  - Are sprints helpful?

# Assess Complexity: The Stacey Complexity Model

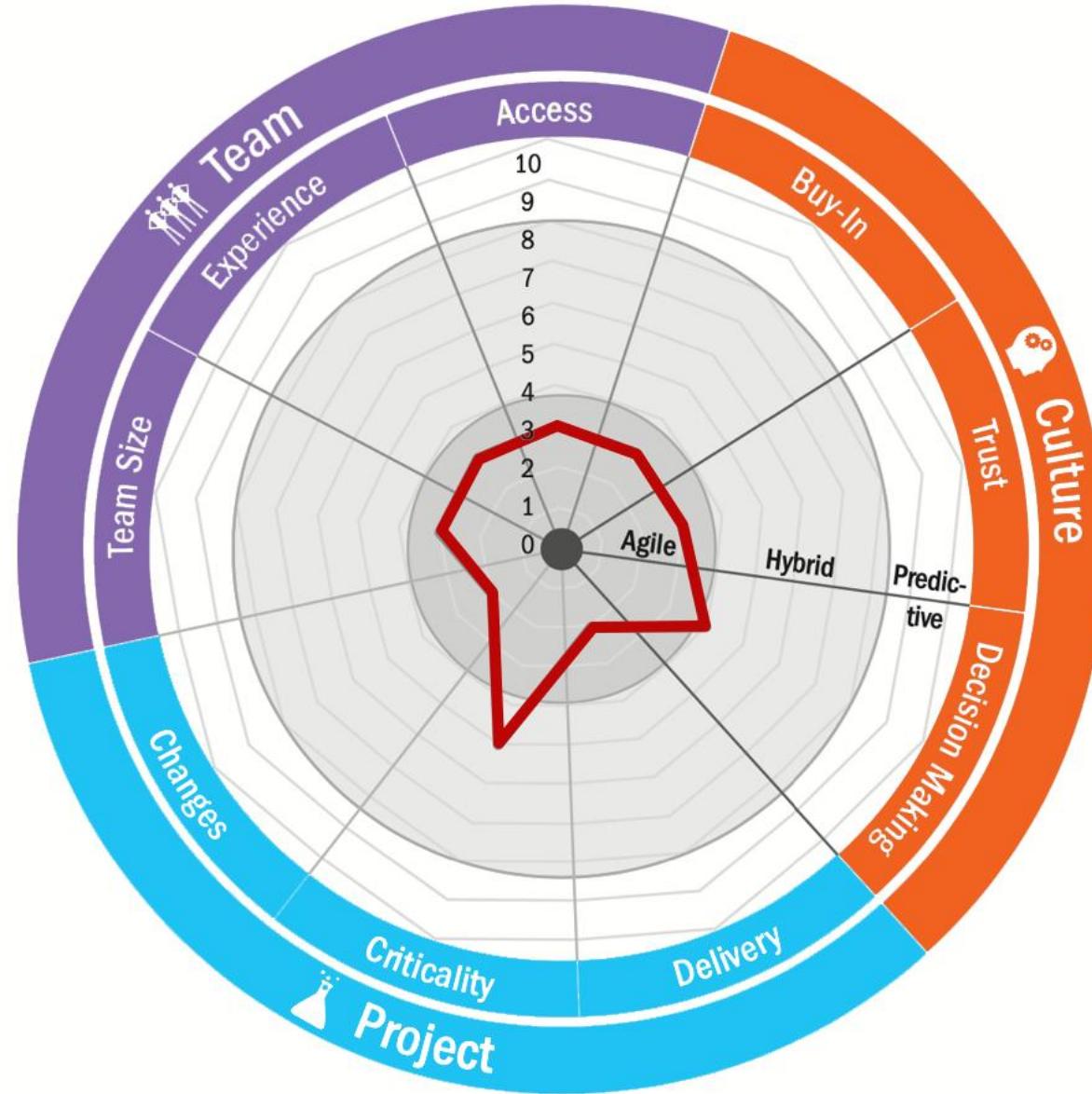
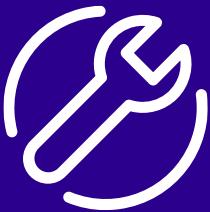
-Ralph D. Stacey



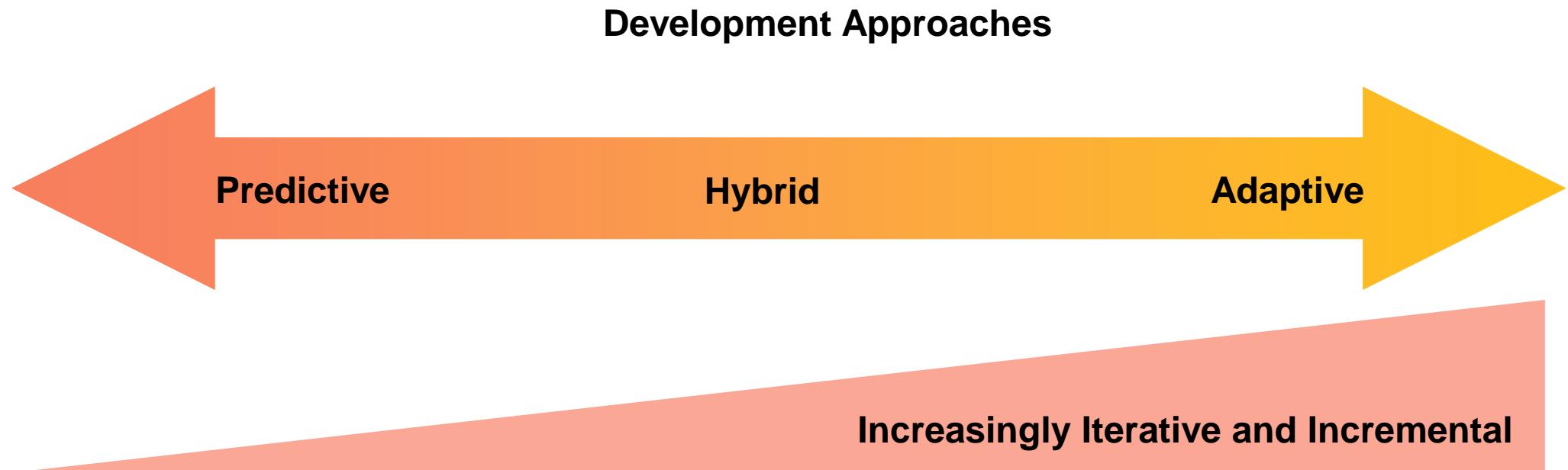
# Suitability

## Filter:

A Diagnostic  
Visual Based on  
Survey Data



# Iterative and Incremental: Overview



- Compatible with each other
  - Used in hybrid and adaptive projects
  - Break down development cycle to enable early value delivery

# Iterative Way of Working: Video



# Scrum



- 
- This is a commonly used agile framework that offers suggestions for how work can be organized to maximize value to the end user.
  - Scrum is implemented at a product development team level.
  - Roles include a **scrum master/senior scrum master** who facilitates ceremonies (meetings); iterations are called **sprints**.



*Remember that Agile frameworks focus on influencing the entire organization, including leadership and company culture.*

# Scrum Ceremonies Overview



- **Sprint planning**
  - Team collaborates with product owner to plan work for current sprint
  - Scrum master/senior scrum master facilitates
- **Daily scrum**
  - Short, daily meeting of team only
  - Team members describe work, ask for help, consider progress toward goal
  - **Not** a status meeting
- **Sprint review – can include Demo**
  - Held at end of sprint
  - Team, product owner and stakeholders attend, or customers review progress and give feedback to adapt product
- **Sprint retrospective**
  - Team identifies improvements to performance and collaboration

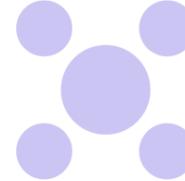
# Agile Ceremonies



*We've discussed the ceremonies over the last few slides. Do you use them in your organization? How effective do they seem to be to you?*

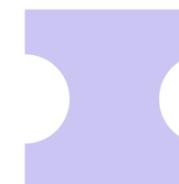
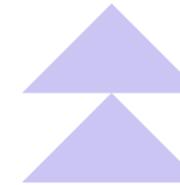
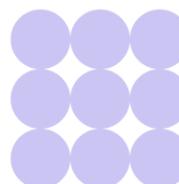
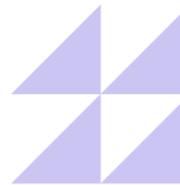
- **Product strategy meeting** – product owner shares product vision
- **Daily standup or standup**
  - Team status meeting
  - 5 to 15 minutes, timeboxed
  - Not necessarily daily
- **Backlog refinement**
  - Product owner prioritizes items on backlog
- **Project retrospective**
  - Held at the end of a project to review work and processes
  - Like lessons learned

# ECO Coverage

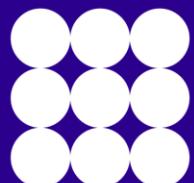
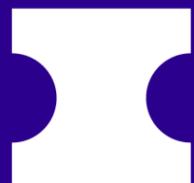
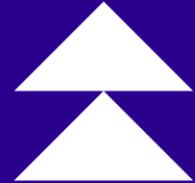
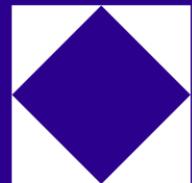
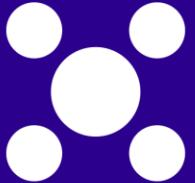
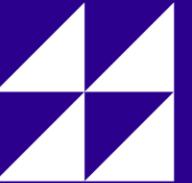


## 2.13 Determine appropriate project methodology/ methods and practices

- Assess project needs, complexity and magnitude (2.13.1)
- Recommend project execution strategy (e.g., contracting, financing) (2.13.2)
- Recommend a project methodology/approach (i.e., predictive, adaptive, hybrid) (2.13.3)



# End of Lesson 2



LESSON 3

# PLAN THE PROJECT

- Planning Projects
- Scope
- Schedule
- Resources
- Budget
- Risks
- Quality
- Integrate Plans



# Learning Objectives

---

- Explain the importance of a project management plan.
- Provide an overview of scope planning in both predictive and adaptive projects.
- Provide an overview of schedule planning in both predictive and adaptive projects.
- Discuss resource planning for a project, including human and physical resources and the role of procurement.
- Determine the budgeting structure/method for a project
- Explain the importance of tailoring a budget.
- Identify strategies for dealing with risks and risk planning.
- Assemble a toolkit of possible responses to risks.
- Define quality and how it relates to the outcomes and deliveries for a project.
- Discuss the importance of integrating project management plans and tailoring a change management process.



# Planning Projects

## TOPIC A

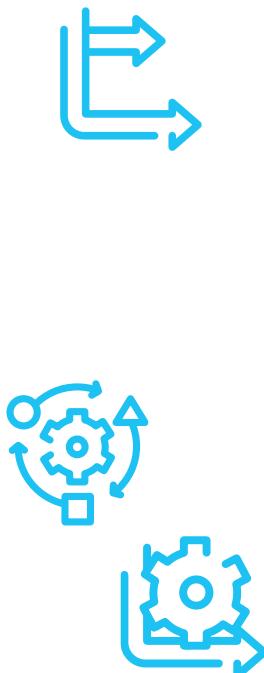
# Planning Starts with a Project Management Plan

The document that describes how the project will be executed, monitored and controlled, and closed.

It includes:

- **Subsidiary plans**
- **Baselines**
- **Additional components**

 \*See definition tab for list



Enables project managers to ....

- Execute
- Monitor
- Control
- Close

- Establishes guardrails to maintain controls, so ....
- Teams can tailor their way of working and act quickly and flexibly!

# Project Documents\*

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Documentation and content created by the team to plan and manage the project effectively

Some documents are project **artifacts**, which need to be maintained and then archived at the end of the project.

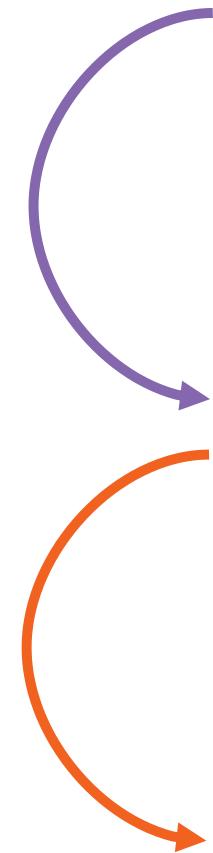
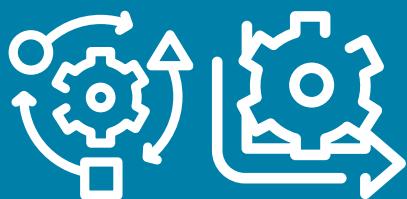


*They are not components of the project management plan.*

 \*See definition tab for list

# Collaborative Planning

## Adaptive and Hybrid Development Approaches



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Product owner decides objectives according to customer needs/wants; team executes work and helps product owner **plan the work**

---

Team members are local domain experts in integration management — how **work will be planned** and completed

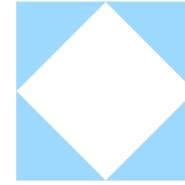
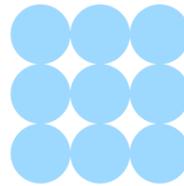
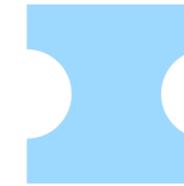
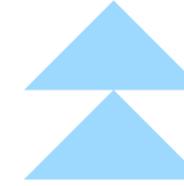
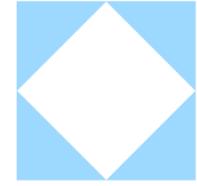
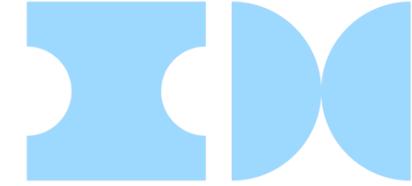
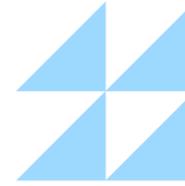
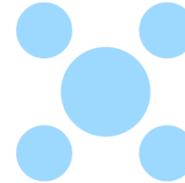
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Project manager, team lead or scrum master helps focus the team to **execute the planned work**

# Planning Across Life Cycles

	Predictive 	Hybrid 	Adaptive 
<b>Requirements specification</b>	Defined in specific terms before development	Elaborated periodically during delivery	Elaborated frequently during delivery
<b>Outcome(s)</b>	Delivered at the end of the project	Can be divided into pieces (incremental)	Delivered after each iteration according to stakeholder-desired value
<b>Change</b>	Constrained as much as possible	Incorporated at periodic intervals	Incorporated in real time during delivery
<b>Stakeholder Involvement</b>	At specific milestones	Regularly	Continuously
<b>Risk and cost controls</b>	Through detailed planning of mostly known consideration	Through progressive elaboration of plans	Done as requirements and constraints emerge

# Topic Coverage





# Scope

## TOPIC B

# Scope

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Click me!



- Project scope or product scope?
- Is it fixed or flexible?



LIFESTYLE CENTRE

*Let's use the Shawpe Lifestyle Centre project—the independent case study part of this course—to understand these terms better.*

PROJECT  
SCOPE

PRODUCT  
SCOPE

FIXED

FLEXIBLE



# Adaptability and Resilience in Planning

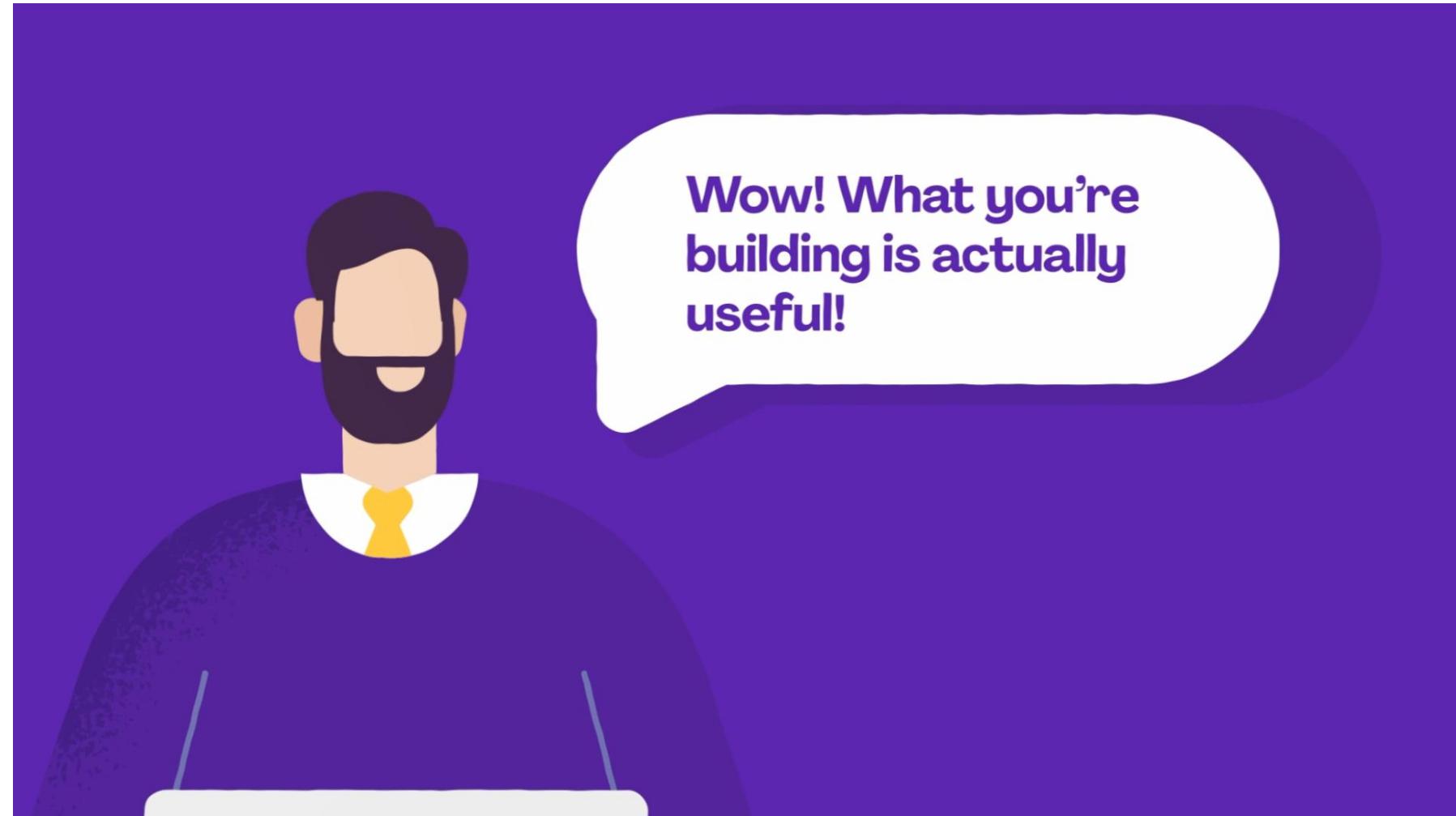
## Rolling Wave Planning

- A form of **progressive elaboration** applied to work packages, planning packages and release planning
- Used in adaptive or predictive approaches



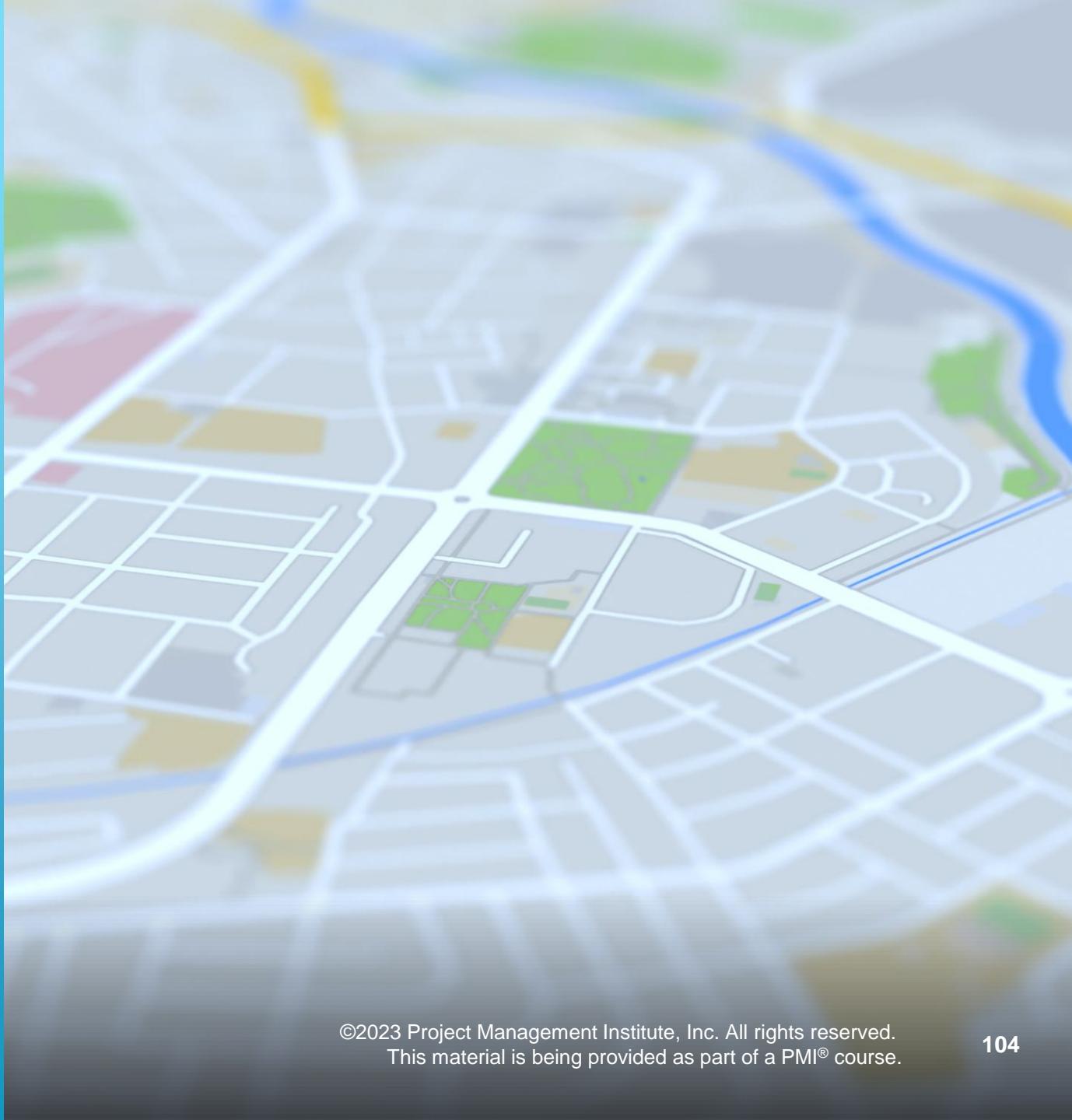
# MVP or MBI?

Planning for  
Work  
Incrementally



# Product Roadmap\*

- Envisions and plans the “big picture”
- Displays product strategy and direction and the value to be delivered
- Leads with the overarching product vision and uses progressive elaboration to refine vision
- Uses themes (goals) to provide structure and associations
- Provides short-term and long-term visualization



# Milestones\*

- **Markers** for big events, reviews, due dates, payments or decision-making
- **Prompts** for reporting requirements or sponsor/customer approval
- **Created by** project managers, customers or both

A **milestone list** identifies all milestones and indicates which are:

- Mandatory - required by contract, or
- Optional (estimated on historical information)



# Scope Planning

## Comparison of Processes

### PROJECT MANAGER



- Facilitates the **Collect Requirements Process**
- **Documents requirements** in a:
  - Scope statement (text/document)
  - Work breakdown structure (WBS) – (visual)
  - Develops schedule, budget, resource and quality plans to deliver requirements



*What might a hybrid scope planning process look like?*

### PRODUCT OWNER



- Creates and refines release backlog for iteration planning meeting
- Explains each prioritized **user story** in detail to the team

### TEAM

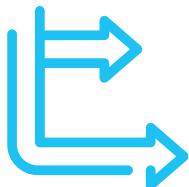
- Estimates effort required and creates the iteration baseline, selecting stories to meet the expected velocity for the iteration.
- Places user stories from product backlog into release backlog to support identified features and functions
- Uses a story map to sequence and prioritize user stories in the release backlog

# Get Started with Requirements?



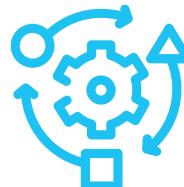
*Does this kind of project start with requirements?*

*Click each button!*



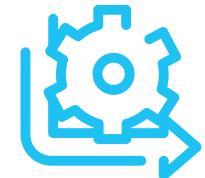
**Yes!**

In predictive projects, requirements are elicited and set at the beginning of the project.



**Sort of...**

User stories are a different way of thinking about the requirements process.

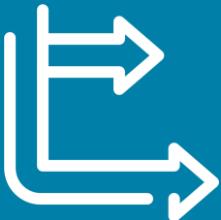


**Maybe!**

Hybrid projects may elicit and refine requirements or compose user stories.

# Requirements

## What Are They and Why Do We Need Them?



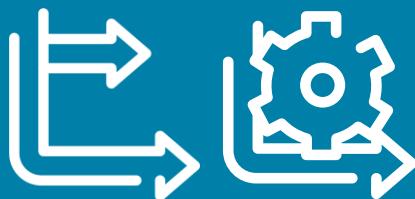
### ***Guidelines for use:***

- *Start at a high level before providing details*
- *Must be unambiguous (measurable and testable), traceable, complete, consistent and acceptable to key stakeholders*

# Document Requirements



- A simple format — e.g., a document listing all requirements, categorized by stakeholder and priority, OR
- More elaborate — e.g., executive summary, detailed descriptions, attachments
- **Requirements traceability matrix**



Requirements Traceability Matrix									
Project Name:									
Cost Center:									
Project Description:									
ID	Associate ID	Requirements Description	Business Needs, Opportunities, Goals, Objectives	Project Objectives	WBS Deliverables	Product Design	Product Development	Test Cases	
001	1.0								
	1.1								
	1.2								
	1.2.1								
002	2.0								
	2.1								
	2.1.1								
003	3.0								
	3.1								
	3.2								
004	4.0								
005	5.0								

# 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

# STAKEHOLDER ENGAGEMENT PLAN

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## STAKEHOLDER ENGAGEMENT PLAN

A component of the project management plan that identifies the strategies and actions required to promote productive involvement of stakeholders in project or program decision-making and execution. Used to understand stakeholder communication requirements and the level of stakeholder engagement in order to assess and adapt to the level of stakeholder participation in requirements activities.

# COMMUNICATIONS MANAGEMENT PLAN

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## COMMUNICATIONS MANAGEMENT PLAN

A component of the project, program, or portfolio management plan that describes how, when, and by whom information about the project will be administered and disseminated.

## COMMUNICATION MODEL

A description, analogy, or schematic used to represent how the communication process will be performed for the project.

# CROSS-FUNCTIONAL TEAM

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## CROSS-FUNCTIONAL TEAM

Teams that have all the capabilities to deliver the work they've been assigned. Team members can specialize in certain skills, but the team is capable of delivering what they've been called on to build. See also "self-organizing teams".

# GENERALIZING SPECIALISTS

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## GENERALIZING SPECIALISTS

Refers to a project team member who has a particular area of deep expertise but also has experience in many other areas that may not be directly related to their core area. These team member types are valued on agile projects because of their ability to be interchangeable.

## T-SHAPED

Refers to a person whose skill set comprises one area of specialization and broad ability in other skills required by the team.

# TEAM CHARTER

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## TEAM CHARTER

A document that records the team values, agreements, and operating guidelines as well as establishes clear expectations regarding acceptable behavior by project team members.

# GROUND RULES

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## GROUND RULES

Expectations regarding acceptable behavior by project team members.

## VIRTUAL TEAM

A group of people with a shared goal who fulfill their roles with little or no time spent meeting face-to-face.

## COLOCATION

An organizational placement strategy in which the project team members are physically located close to one another to improve communication, working relationships, and productivity.

# KEY PERFORMAN CE INDICATORS (KPIs)

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## KEY PERFORMANCE INDICATORS (KPIs)

A set metric used to evaluate a project, an organizational unit, or a project team's performance against the project vision and objectives. KPIs can be time bound.

# PRODUCT BOX EXERCISE

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## PRODUCT BOX EXERCISE

A technique used to explain a desired solution or outcome. Stakeholders try to describe aspects of a solution in the same way a marketer might describe product features and benefits on a box.

# XP METAPHOR

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## XP METAPHOR

A common Extreme Programming (XP) technique that describes a common vision of how a program works.

# PROJECT CHARTER

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## PROJECT CHARTER

A document issued by the project initiator or sponsor that formally authorizes the existence of a project and provides the project manager with the authority to apply organizational resources to project activities.

# PRODUCT MANAGEMEN T

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## PRODUCT MANAGEMENT

The integration of people, data, processes, and business systems to create, maintain, and evolve a product or service throughout its life cycle.

# SUBSIDIARY MANAGEMEN T PLANS

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## PROJECT MANAGEMENT PLAN COMPONENTS

### SUBSIDIARY MANAGEMENT PLANS

- Scope management plan
- Requirements management plan
- Schedule management plan
- Cost management plan
- Quality management plan
- Resource management plan
- Communications management plan
- Risk management plan
- Procurement management plan
- Stakeholder engagement plan



## PROJECT MANAGEMENT PLAN COMPONENTS

### Baselines

- Scope baseline
- Schedule baseline
- Cost baseline

# ADDITIONAL COMPONENT S

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## PROJECT MANAGEMENT PLAN COMPONENTS

### ADDITIONAL COMPONENTS

- Change management plan
- Configuration management plan
- Performance measurement baseline
- Project life cycle
- Development approach
- Management reviews

# PROJECT DOCUMENTS

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## PROJECT DOCUMENTS

Any documents that are prepared in support of a project – for example, requirements, specifications, contracts with vendors, design documents, test plans, and publications that will be delivered to the client along with the final product.

# PROJECT SCOPE

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## PROJECT SCOPE

The features, functions, and works that characterize the delivery of a product, service, and/or result. Highly dependent on triple constraints of time, cost, and quality.

# PRODUCT SCOPE

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## PRODUCT SCOPE

The functions and features that characterize a product or a service.

# ROLLING WAVE PLANNING



## ROLLING WAVE PLANNING

An iterative planning technique in which the work to be accomplished in the near term is planned in detail, while the work in the future is planned at a higher level.

# PROGRESSIVE ELABORATION

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## PROGRESSIVE ELABORATION

The iterative process of increasing the level of detail in a project management plan as greater amounts of information and more accurate estimates become available.

# PRODUCT ROADMAP

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## PRODUCT ROADMAP

A high-level visual summary of the product or products of the project that includes goals, milestones, and potential deliverables.

# MILESTONE

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## MILESTONE

A specific point within a project life cycle used as a measure in the progress toward the ultimate goal. A milestone marks a specific point along a project timeline. The point may signal anchors such as a project start and end date, a need for external review, or input and budget check. It is represented as a task of zero duration and is displayed as an important achievement in a project.

# COLLECT REQUIREMEN TS PROCESS

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## COLLECT REQUIREMENTS PROCESS

The process in which requirements documentation is developed. Precedes the Define Scope process.

# REQUIREMENTS DOCUMENTATION

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## REQUIREMENTS DOCUMENTATION

A description of how individual requirements meet the business need for the project.

# USER STORY

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## USER STORY

An informal, general explanation of a product, service, or software feature written from the perspective of the end user. Its purpose is to articulate how the feature will provide value to the customer.