

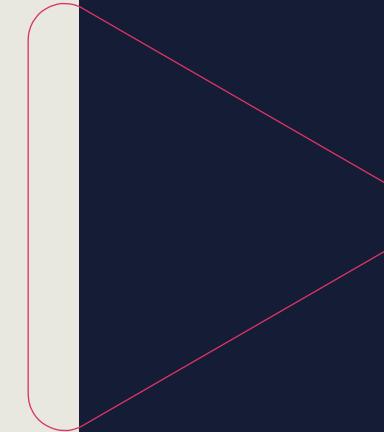


# **PMP® EXAM PREP**

## PMI Authorized Training Partner

### **BOOTCAMP**

### **Session 5**



Instructor: Priscilla Bakx-Kabai, MCE,  
PMP®, ACP®, DASSM, LSSGB

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**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.**

### **PMP® Exam Prep**

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

# HOUSEKEEPING

## Resources & Materials



This class will be recorded for quality assurance purposes.

For any issues regarding accessing resources via Percipio, please ask for support via Q&A.



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English (US) ▾

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Home

Need help? We're here.

What do you need help with?



Assignments

Compliance

Activity

Digital Badges

Playlist

Skills

Account Information

Help

Log Out



Get started



Knowledge Base



What's new?

# Your PMP Bootcamp Course Syllabus

## (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			

# Recap Session 04

**PMP® EXAM PREDICTION**  
Training Partner  
Session 4

Class will begin at:  
Start Date: 03/01  
End Date: 03/07

**PMP® Exam Prep**  
PMP® Exam Prep  
is designed to help you learn  
and remember the information  
you need to pass the PMP® exam.

**Your PMP Bootcamp Course Syllabus**  
(Prepared by the DND Student Services)

Week	Module	Topics
Week 1	Introduction	Project Management Overview, Project Phases, Project Stakeholders, Project Scope, Project Charter, Project Charter Components, Project Charter Examples, Project Charter Template, Project Charter Checklist, Project Charter Approval, Project Charter Sign-off, Project Charter Distribution, Project Charter Version Control, Project Charter Retention Period, Project Charter Archiving, Project Charter Disposal.
Week 2	Planning	Project Planning, Project Planning Components, Project Planning Examples, Project Planning Template, Project Planning Checklist, Project Planning Approval, Project Planning Sign-off, Project Planning Distribution, Project Planning Version Control, Project Planning Retention Period, Project Planning Archiving, Project Planning Disposal.
Week 3	Execution	Project Execution, Project Execution Components, Project Execution Examples, Project Execution Template, Project Execution Checklist, Project Execution Approval, Project Execution Sign-off, Project Execution Distribution, Project Execution Version Control, Project Execution Retention Period, Project Execution Archiving, Project Execution Disposal.
Week 4	Closure	Project Closure, Project Closure Components, Project Closure Examples, Project Closure Template, Project Closure Checklist, Project Closure Approval, Project Closure Sign-off, Project Closure Distribution, Project Closure Version Control, Project Closure Retention Period, Project Closure Archiving, Project Closure Disposal.

**Recap Session 03**

**Plan and Manage Procurement**  
Module 6

**Deliverables and Tools**

- Universal Work Procurement Management Plan
- Procurement Strategy
- Change Control Log
- Procurement Techniques
- Bidder Conference
- Change Requests

**Procurement Strategy**

The process by the buyer to define the project delivery contract and the type of legal binding agreement that should be used to deliver the desired results.

**Delivery Solution**

The goal of procurement is to source products or services by the regular vendor or organization.

**Make or Buy?**

Make or buy analysis - The process of gathering information about the cost of buying a product or service versus the cost of manufacturing it internally or outsourcing it to another vendor.

- What is the item needed, how is it used?
- How many are required?
- Is there a local supplier?
- Is there a reliable supplier?

**Procurement Planning**

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**More about...**

Contract Types (Part 1) Project Procurement (2021 Update) Volume 1 (303 pages)

**Make-or-Buy Analysis**

**Procurement SOW**

The Statement of Work (SOW) is a formal document that defines the scope of work to be performed by a vendor or provider for a project or program.

- Defines the overall procurement strategy and scope of work.
- Describes the tasks and responsibilities of the vendor or provider.
- Establishes the timeline and milestones for the procurement process.
- Specifies the procurement method and selection criteria.

**Procurement Management Plan**

**Source Selection Criteria**

It is often determined by the buyer what criteria are required to meet the needs of the project or program.

- Understanding of the requirements and scope of the project.
- Technical capability.
- Financial stability.
- Experience and reputation.
- Ability to provide timely delivery.
- Quality of previous work.
- Financial performance of vendor.
- Compliance with industry standards.

**Qualified Vendors**

These are pre-qualified suppliers who have been evaluated and selected based on their ability to meet the requirements of the procurement.

**Bidder Conferences**

These are mandatory procurement activities where potential suppliers are invited to present their proposals and qualifications.

**External Resources Requirements and Needs**

Identify resources that are required for the project or program based on the requirements and needs of the project.

**Supplier and Contractors**

Contract - Available bidding document that outlines the requirements for the supplier or contractor to provide goods or services.

- Contract documents
- Contract duration
- Contract value
- Agreement terms and conditions
- Contract termination clauses
- Contract cancellation clauses

**Procurement Planning**

9

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16

**Communicating with Suppliers and Vendors**

Contract management is the process of managing the relationship between the organization and its suppliers or vendors throughout the life cycle of the contract.

- Contract management involves monitoring and controlling the performance of suppliers or vendors.
- Periodic progress reports are issued to the organization and its suppliers or vendors to ensure that the project is progressing as planned.
- Contract management also involves resolving disputes and managing changes to the contract.

**Components of Contracts**

- Definition of work to be performed by the vendor or provider, and the scope of work.
- Delivery date and milestones.
- Scope of work.
- Requirements and specifications.
- Responsibilities of both parties.
- Financial terms and conditions.
- Termination clauses.
- Penalties for non-compliance.
- Confidentiality and intellectual property rights.

**Traditional Contract Types**

Type	Description
Fixed Price Contract	The vendor or provider is paid a fixed amount for performing the work.
Cost Plus Contract	The vendor or provider is paid a fixed amount plus a percentage of the cost of performing the work.
Time and Materials Contract	The vendor or provider is paid a fixed amount per hour or day for performing the work.
Performance-Based Contract	The vendor or provider is paid a fixed amount based on the quality of the work performed.

**Agile Contract Types**

Type	Description
Scrum Contract	A vendor or provider is paid a fixed amount for performing the work in sprints.
Iterative Contract	A vendor or provider is paid a fixed amount for performing the work in iterative cycles.
Agile Contract	A vendor or provider is paid a fixed amount for performing the work in an agile manner.

**Contract Types and Procurement Considerations**

**Contract Change Control System**

The process used to control, track, and communicate changes to the contract during its life cycle.

- Identify the requirements of the contract and the changes that need to be made.
- Specify the procedures for requesting changes.
- Document the changes and update the contract accordingly.
- Monitor and evaluate the changes to ensure they meet the requirements of the contract.

**Types of Contract Changes**

Type	Description
Administrative Changes	Changes that do not affect the scope or requirements of the contract.
Substitution Changes	Changes that replace one part of the contract with another.
Termination Changes	Changes that end the contract or modify its termination provisions.

**Project Governance**

- Define roles and responsibilities.
- Establish reporting relationships.
- Establish communication channels.
- Establish decision-making processes.
- Establish conflict resolution mechanisms.
- Establish risk management processes.
- Establish compliance processes.
- Establish performance measurement and reporting processes.
- Establish corrective action processes.

17

18

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24

**Legal Concepts when Managing Disputes**

Dispute resolution is a process used to resolve disputes between parties involved in a contract or agreement.

- Arbitration
- Mediation
- Litigation

**Handle Disputes**

- Identify the relevant legal framework, "dispute", and "discrepancy".
- Consult with legal counsel to understand the relevant laws and regulations.
- Identify the cause of the dispute and determine the best course of action.
- Identify the relevant contractual provisions that govern the dispute.
- Identify the relevant legal remedies available for the dispute.
- Identify the relevant legal procedures for resolving the dispute.
- Identify the relevant legal documents and evidence required for the dispute.
- Identify the relevant legal expenses associated with the dispute.

**Manage Suppliers and Contracts**

- Define and document the requirements for the vendor or provider.
- Identify the vendor or provider's capabilities and experience.
- Establish a contract with the vendor or provider.
- Monitor and evaluate the vendor or provider's performance.
- Identify opportunities for improvement and collaboration.
- Establish a feedback loop for continuous improvement.

**Establish Project Governance Structures**  
Module 6

**Deliverables and Tools**

- Stakeholder Analysis
- Organizational Process Assets
- Stakeholder Identification
- Stakeholder Engagement
- Stakeholder Monitoring and Review

**Project Governance**

**Project Governance**

- Define roles and responsibilities.
- Establish reporting relationships.
- Establish communication channels.
- Establish decision-making processes.
- Establish conflict resolution mechanisms.
- Establish risk management processes.
- Establish compliance processes.
- Establish performance measurement and reporting processes.
- Establish corrective action processes.

**Project Phases**

Collection of logically related project activities that are organized in time frames.

25

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32

**Apply Governance to the Project Life Cycle**

Project governance is the application of governance principles and practices to the project life cycle.

- Initiation
- Planning
- Execution
- Monitoring and Controlling
- Closure

**Phase Gates**

A phase gate is a decision point in the project life cycle where certain milestones are reached and the project moves to the next phase.

- Identify the key milestones and deliverables for each phase.
- Establish the criteria for moving from one phase to the next.
- Define the actions required to move from one phase to the next.
- Establish the responsibilities for each phase.

**Phase-to-Phase Handover**

Handover relationships contain communication plans that detail the level of involvement required from the receiving party to ensure successful handover.

**More about...**

Contract Selecting a Project Management Approach (2021 Update) Volume 1 (303 pages)

**Characteristics of Project Phases**

**Deliverables and Tools**

- Definition of Phase
- Phase Identification
- Phase Selection
- Phase Planning
- Phase Monitoring and Control
- Phase Closure

**Plan and Manage Project/Phase Closure**  
Module 6

**Deliverables and Tools**

- Definition of Phase
- Phase Identification

**Close Project or Phase**

Successful completion of the project or phase.

- Finalize all outstanding deliverables.
- Release any remaining financial resources.
- Notify all stakeholders that the project or phase has been completed.

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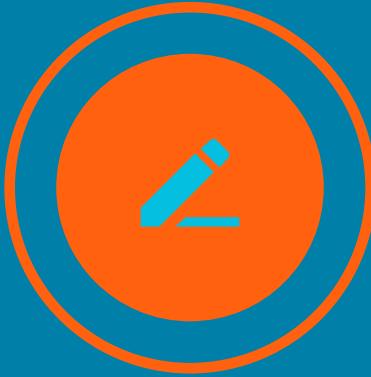
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# Manage Communications

TOPIC C

# Deliverables and Tools

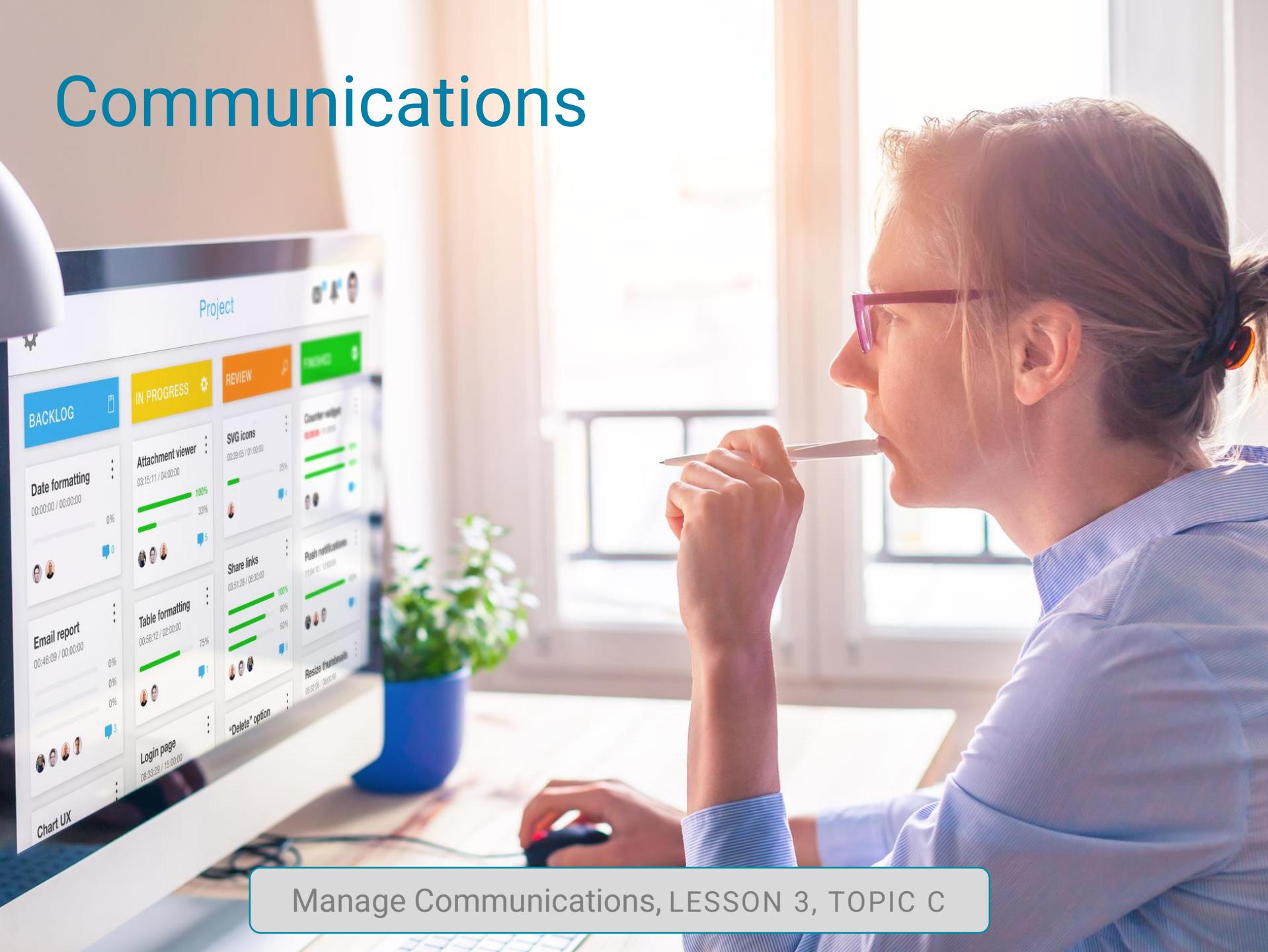


Communications Management Plan  
Project Communications  
Stakeholder Register  
Work performance and change updates



Stakeholder analysis  
Create and update project communications plan  
Update documents  
Understand and practice Sender-Receiver Model

# Communications

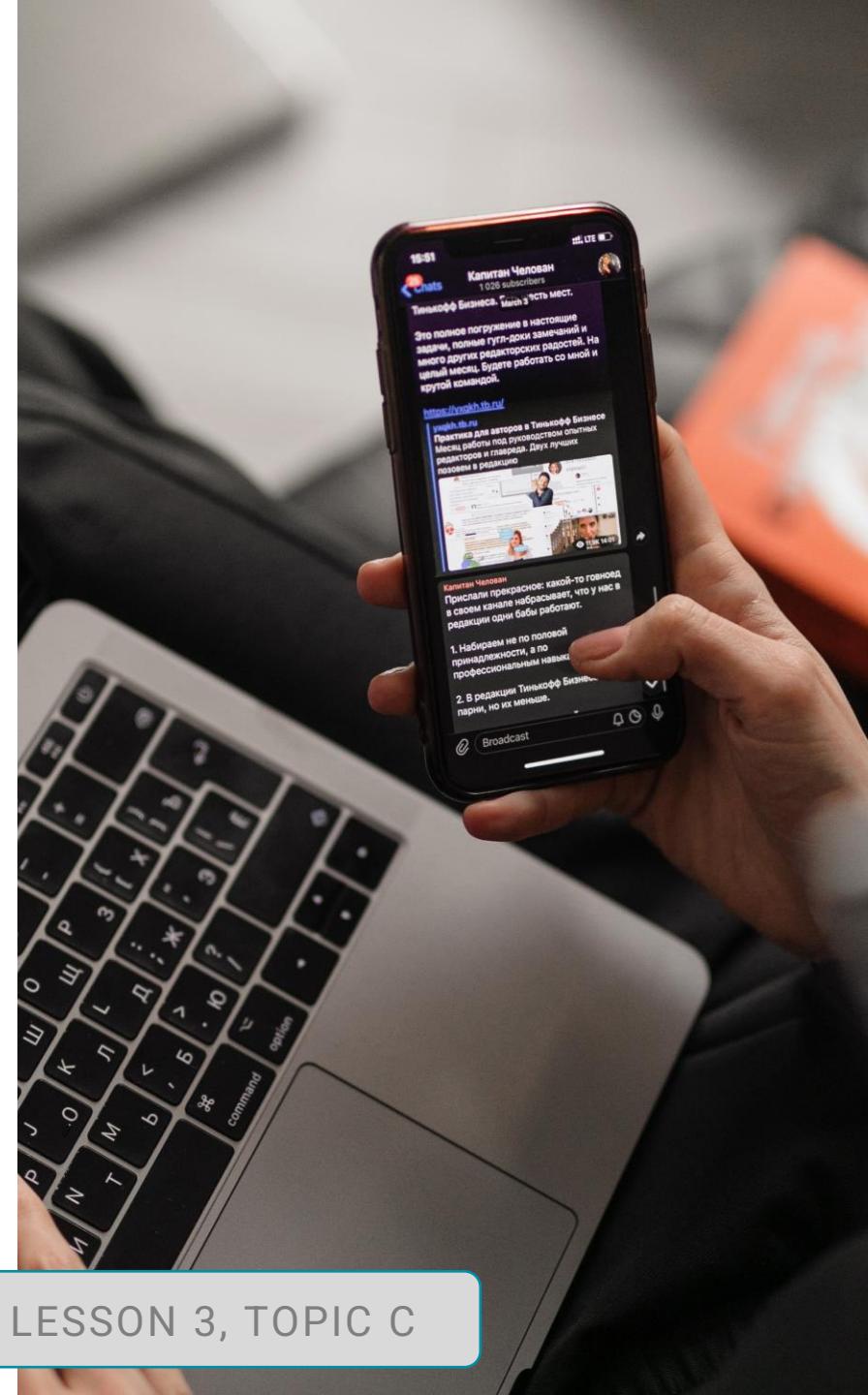


Manage Communications, LESSON 3, TOPIC C

# Project Communications

Consider these dimensions:

- ✓ Internal and external stakeholders
- ✓ Formality or informality - content and format
- ✓ Hierarchy – adjust tone upward, downward, or horizontally
- ✓ Official or unofficial need e.g. annual reports or governance related vs. project team communication
- ✓ Written or verbal – remember tone, inflection, and nonverbal gestures are influential!



# Spotlight: Communication Channels

# Communications Management Plan Example

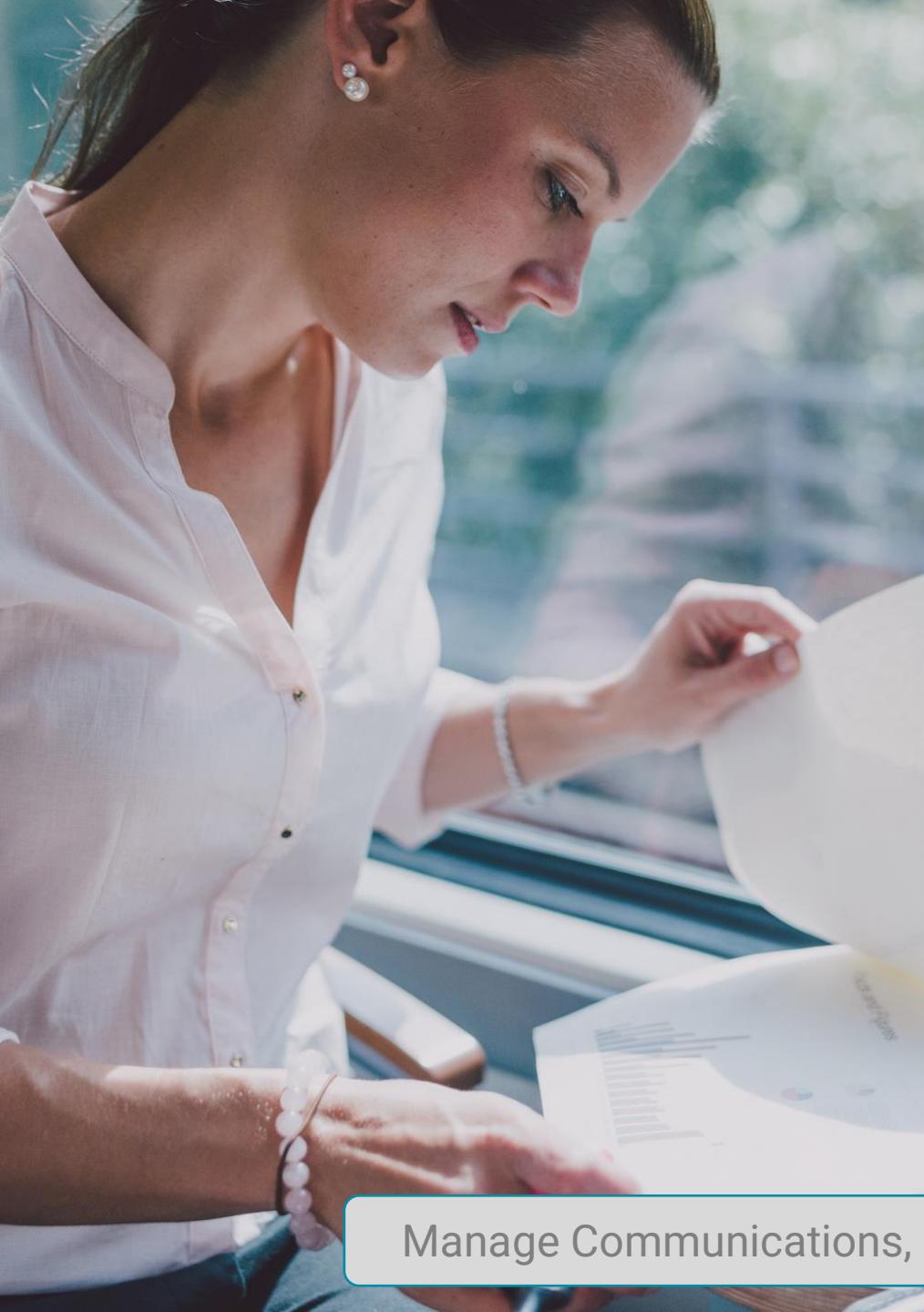
Communication	Frequency	Responsibility	Stakeholder	Notes
Project Kickoff Meeting	Start of project	PMO	Key Stakeholders	Both team and client kickoff meetings recommended
Extranet	Ongoing	PMO		Includes project schedule, key project deliverables, meeting minutes, change request log, issues log
Executive Steering Committee	Monthly – first Wednesday of each month	Account Manager	Client Executive	Review status, milestones met, earned value indicators, key issues
Status Meetings Status Report (Email)	Weekly – Friday 2 p.m.	Project Manager	Client Sponsor	Review project status, schedule, change requests, issues
Status Meetings	Weekly – Friday 11 a.m.	Project Manager	Development Team	Provides input for subsequent meetings with client sponsor
Newsletter (Email)	Weekly – Friday	PMO	Client Managers	
Client Satisfaction Survey	Monthly/end of each phase	Account Manager/Project Manager	Client Sponsor/Key Client Stakeholders	Informal (Monthly) Formal (End of each phase)

Manage Communications,  
LESSON 3, TOPIC C

# Communications Management Plan - Components

- ✓ Stakeholder communications requirements
- ✓ Information to be communicated, including language to be used
- ✓ Reason
- ✓ Time frame and frequency
- ✓ Responsible person – i.e. release of confidential information
- ✓ Receivers
- ✓ Methods or technologies of conveyance
- ✓ Time and budget allocation
- ✓ Escalation process for issues that need visibility
- ✓ Update method for the plan
- ✓ Glossary of common terminology
- ✓ Flowcharts depicting flow of information
- ✓ Constraints due to regulation or policies

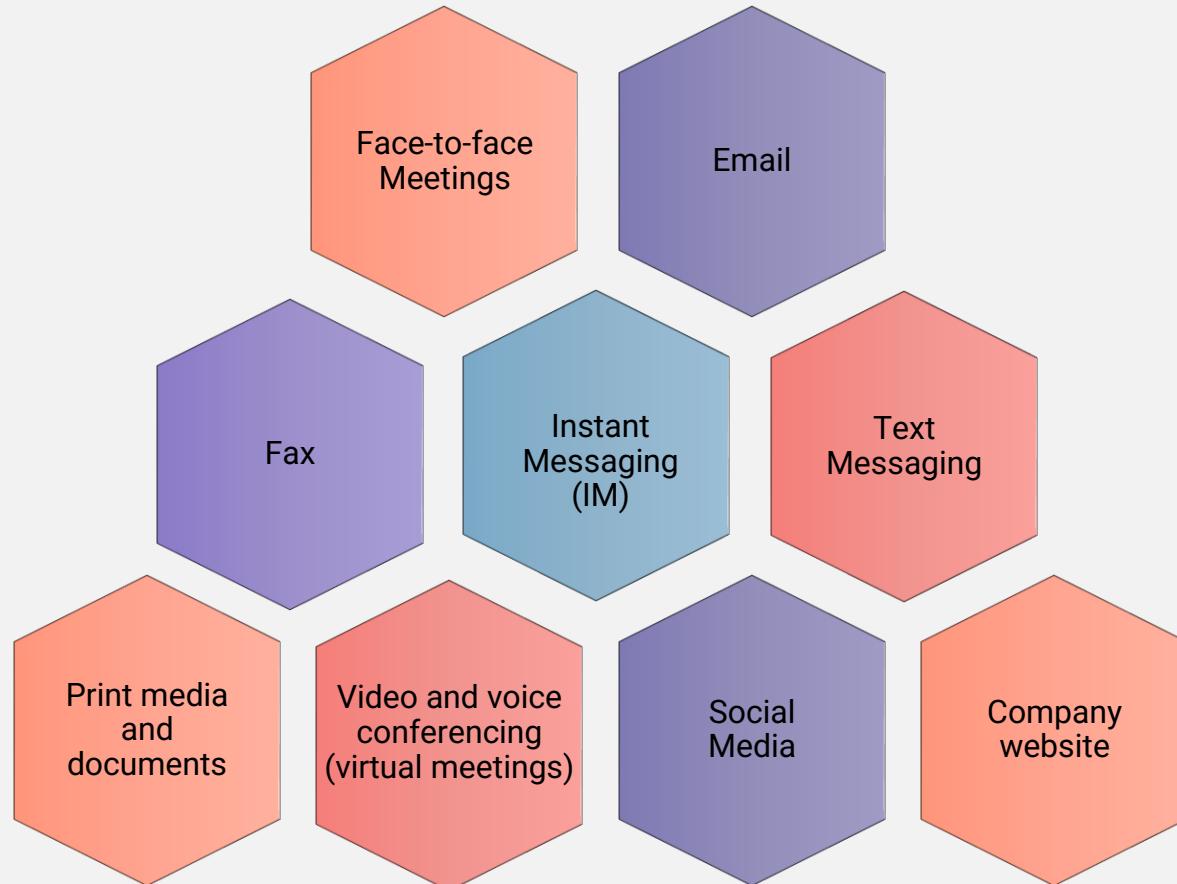




# Communication Requirements Analysis

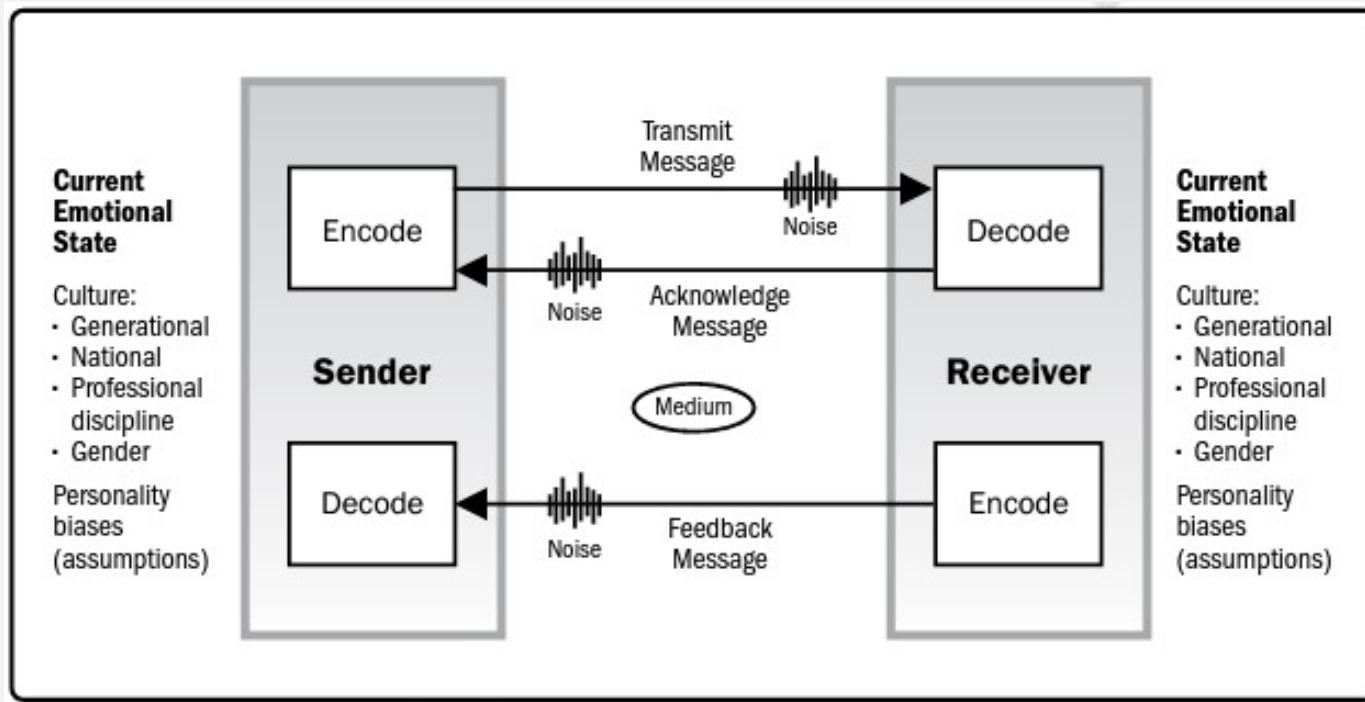
- ✓ Leads to a clear articulation of the **stakeholders' communications needs**.
- ✓ Enables **effective choices** regarding the technologies to be recommended.
- ✓ Takes the form of a **grid, questionnaire** or **survey** that documents the communications and technology requirements for each stakeholder.

# Communication Types



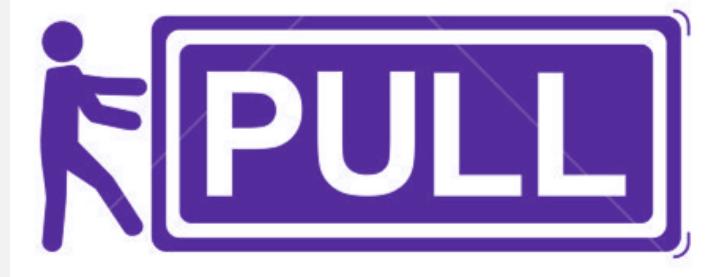
# Spotlight: Project Status Reports

# Communication Model



## Sender-Receiver Model

# Communication Methods



Interactive

# Feedback

- ✓ Communication is a **two-way street**.
- ✓ Both **critical** and **affirming** feedback are key.
- ✓ Feedback **can be positive** if received and understood as intended.
- ✓ Feedback can be negative because of misunderstanding.
- ✓ No feedback provides an implicit acceptance of the message by the receiver.
- ✓ **Effective feedback** is clear, specific, and offered in a timely manner.



Manage Communications, LESSON 3, TOPIC C

## GUIDELINES

# Effectively Manage Communication

Manage  
Communication  
s, LESSON 3,  
TOPIC C

- Gather and distribute contact information for all involved parties.
- Determine the **communication needs** of project stakeholders.
- Tailor amount of **detail and frequency** to recipient needs; project team members may require more detail on a more frequent basis. Senior management typically requires summary information on a less frequent basis.
- Analyze the value to the project of providing the information.
- Evaluate any constraints and assumptions to determine their possible impact on communication planning.
- Determine the **appropriate communications technologies** to use for communicating project information.
- Ensure your communications management plan includes all key elements.
- Integrate the communications management plan into the project plan.
- **Distribute** the plan to project stakeholders.





## Engage Stakeholders

TOPIC D

# Deliverables and Tools



Stakeholder Register

Stakeholder Engagement Plan

Work performance information  
assessment



Organizational Process Assets

Expert judgment

Meetings

Power or Influence vs. Impact Grid

Interpersonal skills

Management skills

Stakeholder Register

# Stakeholder Categories



# Stakeholder Register

- ✓ Main output of the Identify Stakeholders process.
  - ✓ Includes, but is not limited to:
    - Identification information** - Name, position, contact details, etc.
    - Assessment information** - Major requirements, expectations, influence on project outcomes, primary involvement
- Stakeholder classification -**
- Internal, external
  - Impact/influence/power/interest
  - Upward/downward/outward/sideways



# Stakeholder Engagement Strategy



Engage Stakeholders, LESSON 3, TOPIC D

# Stakeholder Engagement Assessment Matrix - Example

Stakeholder	Unaware	Resistant	Neutral	Supportive	Leading
Stakeholder 1	C			D	
Stakeholder 2			C	D	
Stakeholder 3				C	D

C = Current engagement level

D = Desired engagement level

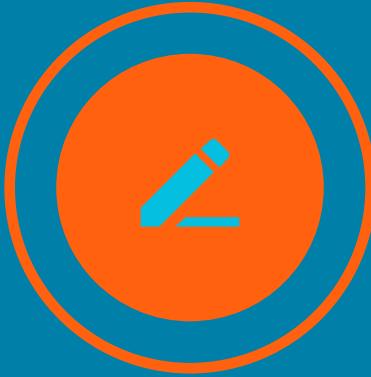
## GUIDELINES

# Develop, Execute, and Validate a Strategy for Stakeholder Engagement

- Review the Project management plan, Stakeholder register, EEFs and OPAs
- Use tools and techniques such as expert judgment.
- Hold meetings with experts and the project team.
- Use analytical techniques to classify stakeholder engagement levels.
- Document the stakeholder engagement plan.

Engage  
Stakeholders,  
LESSON 3, TOPIC  
D





# Create Project Artifacts

TOPIC E

# Deliverables and Tools



No specific deliverables



No specific tools

# Artifacts vs. Deliverables and Project Documents

## Artifacts

Project teams create artifacts during project work; these facilitate management of the project.

## Project Documents

are integral documents for a project; they define and support the work of the project. They are regularly updated by project management processes.

## A Deliverable

is any unique and verifiable product, result, or capability (tangible or intangible) to perform a service, that is required to be produced to complete a process, phase, or project.

# Project Artifact



Artifacts enable reconstruction of the history of the project and to benefit other projects.

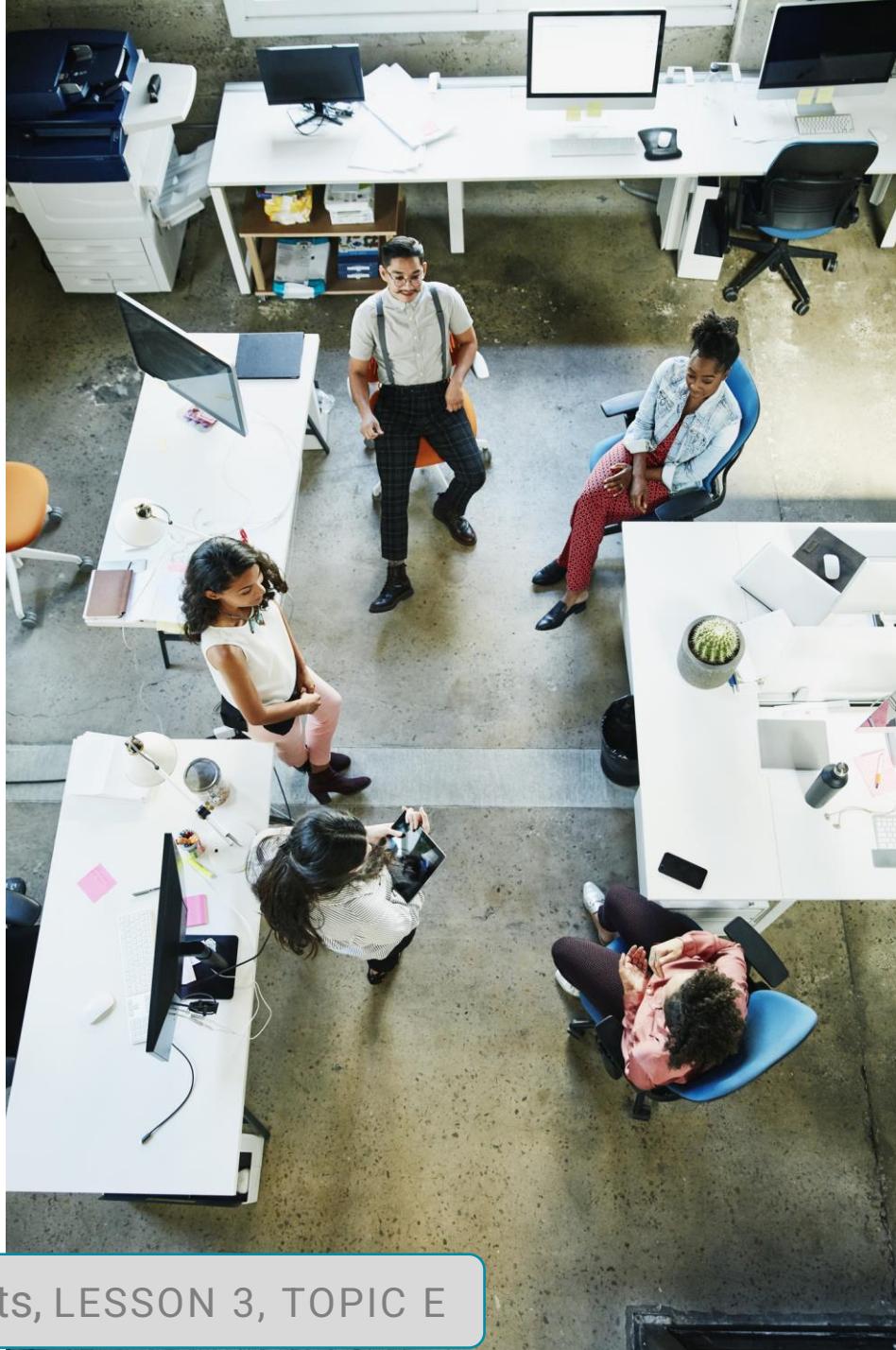


Project teams create and maintain many artifacts during the life of the project.

# Project Artifact Examples

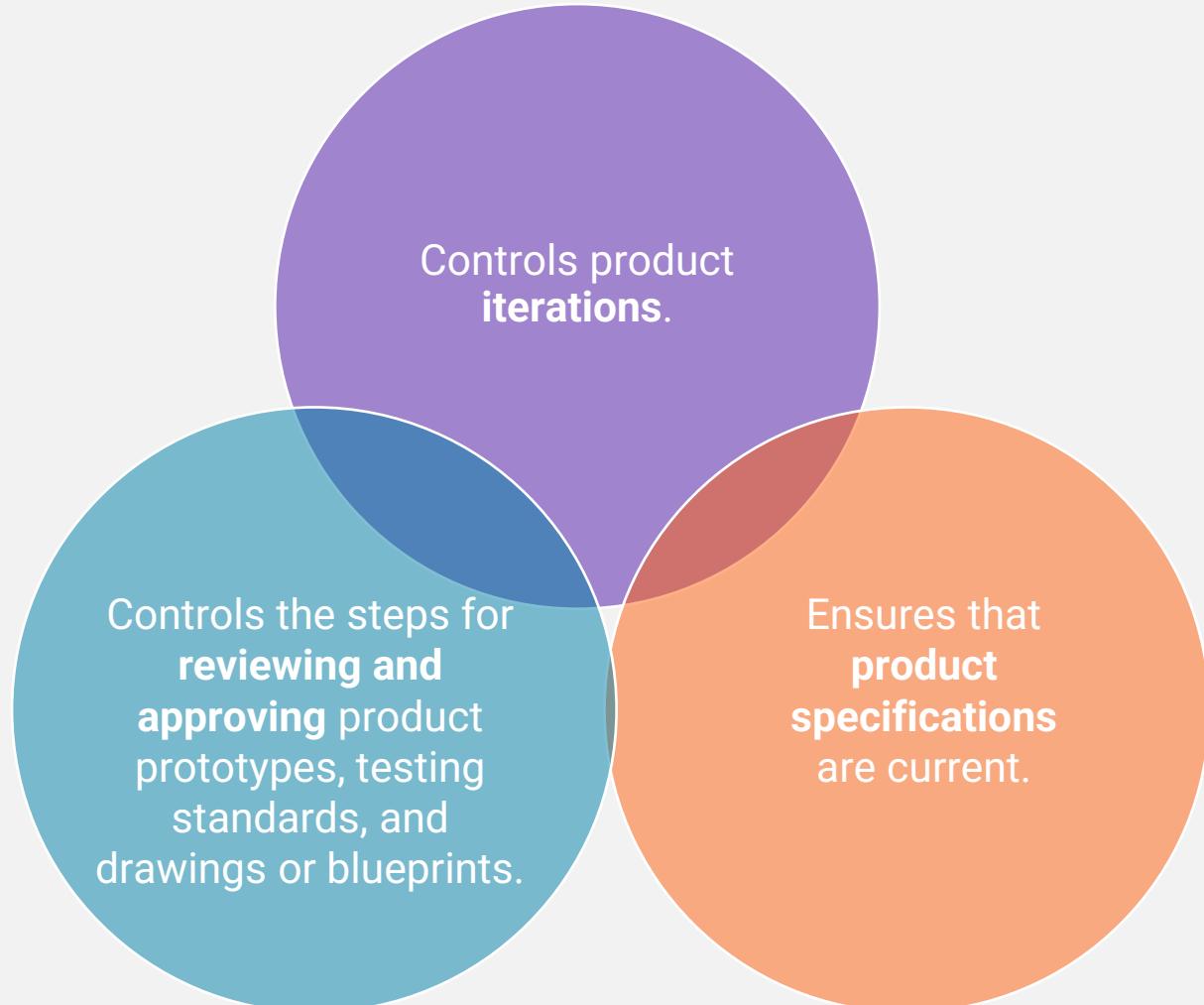
Project artifacts might include:

- ✓ Acceptance Criteria
- ✓ Assumptions
- ✓ Business Case
- ✓ Change Requests
- ✓ Constraints
- ✓ Lessons learned
- ✓ Minutes of status meetings
- ✓ Project Charter
- ✓ Slide decks
- ✓ Requirements



# Configuration Management

Create  
Project  
Artifacts,  
LESSON 3,  
TOPIC E



# Version Control

- ✓ Each time a file is updated, give it a **new version number**.
- ✓ Include a **date/time stamp** and the name of the user who made the changes, providing a digital “paper trail” of the document’s history.
- ✓ Use version control for **important artifacts** such as the business case, project charter, requirements, and other documents.





## Storage and Distribution of Artifacts

- ✓ Store artifacts in an accessible location for users.
- ✓ Use a storage and distribution system that matches the complexity of the project –
- ✓ Use cloud-based document storage and retrieval systems for larger projects, especially where team members are geographically distributed.
- ✓ Typical systems may include:
  - Built-in version control
  - Document check-out and check-in
  - User-based document security
  - Automatic email notification to specified users when a document is created or edited

Create  
Project  
Artifacts,  
LESSON 3,  
TOPIC E



# Project Artifact Management

An effective archive management system includes:

- ✓ A simple way to **produce** and **control** documents
- ✓ **Standardized** formats and templates
- ✓ A structured process for the **review** and **approval** of documents
- ✓ Version control and security
- ✓ **Timely distribution** of documents



# Manage Project Changes

TOPIC F

# Deliverables and Tools

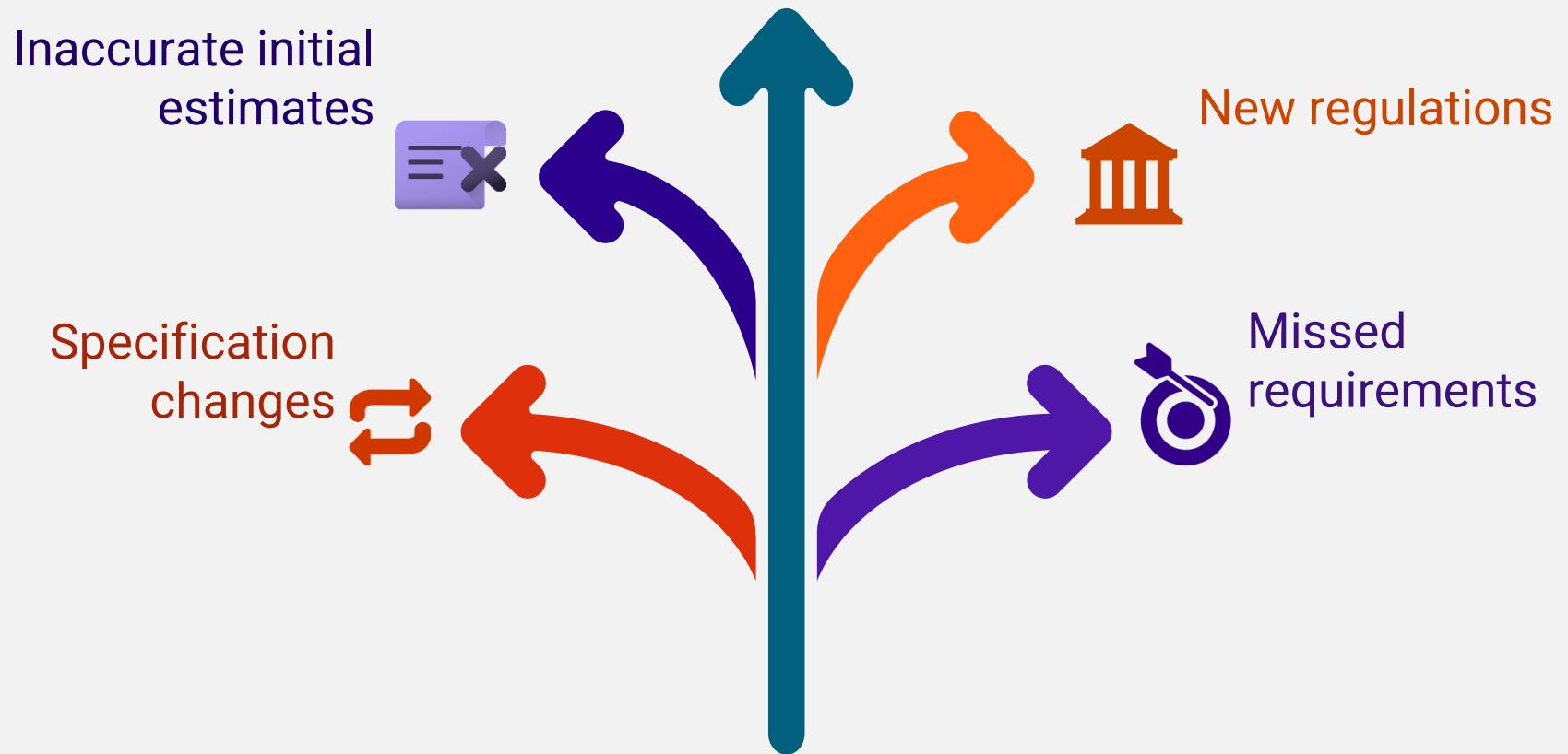


Issues Log  
Risk Register  
Stakeholders Register  
Updated Issues Log

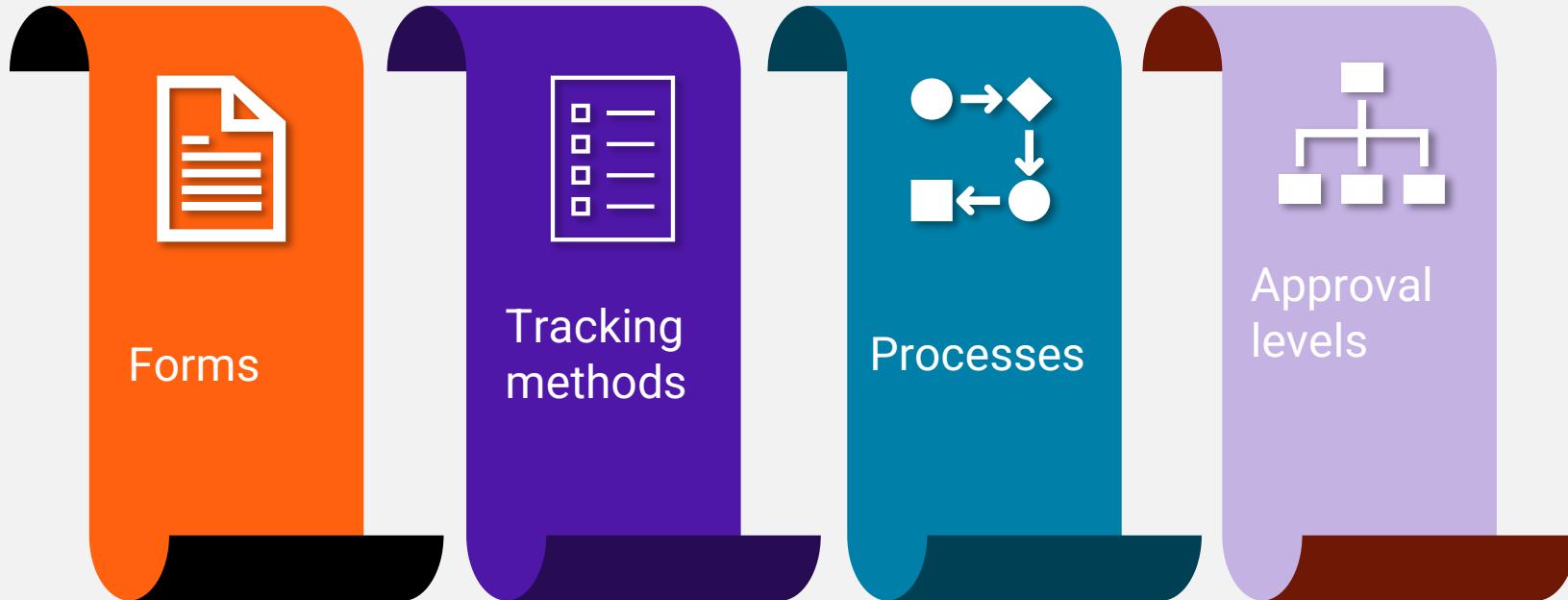


Manage and update Issues Log  
PMIS  
Communicate with stakeholders  
Negotiate with stakeholders

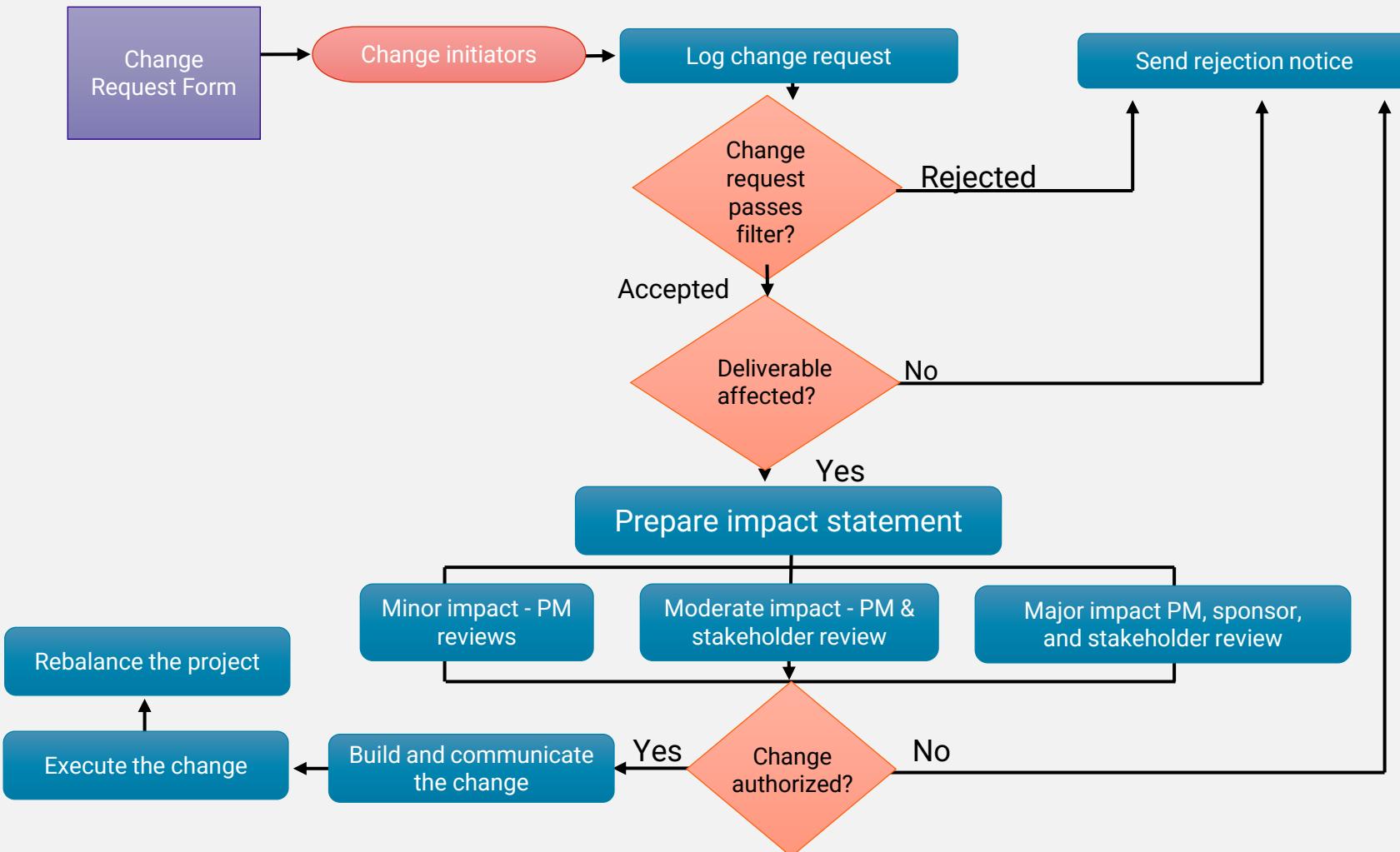
# Causes of Project Changes



# Change Control Systems



# Change Management Process Flowchart



Manage  
Project  
Changes,  
LESSON 3,  
TOPIC F

# Change Requests

Types of change requests:

## Corrective action

Adjusts the performance of the project work with the project management plan.

## Preventive action

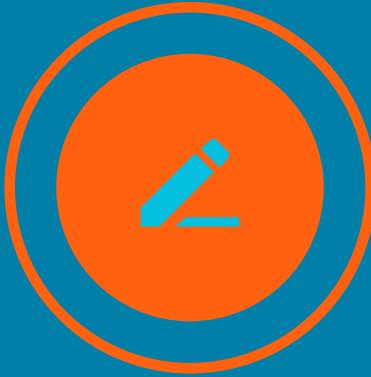
Ensures future performance of the project work with the project management plan

## Defect repair

Modifies a non-conformance within the project.

## Update

Modifies a project document or plan.

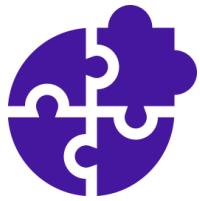


# Manage Project Issues

TOPIC G

DOING THE WORK > MANAGE PROJECT ISSUES

# Deliverables and Tools



Issue log

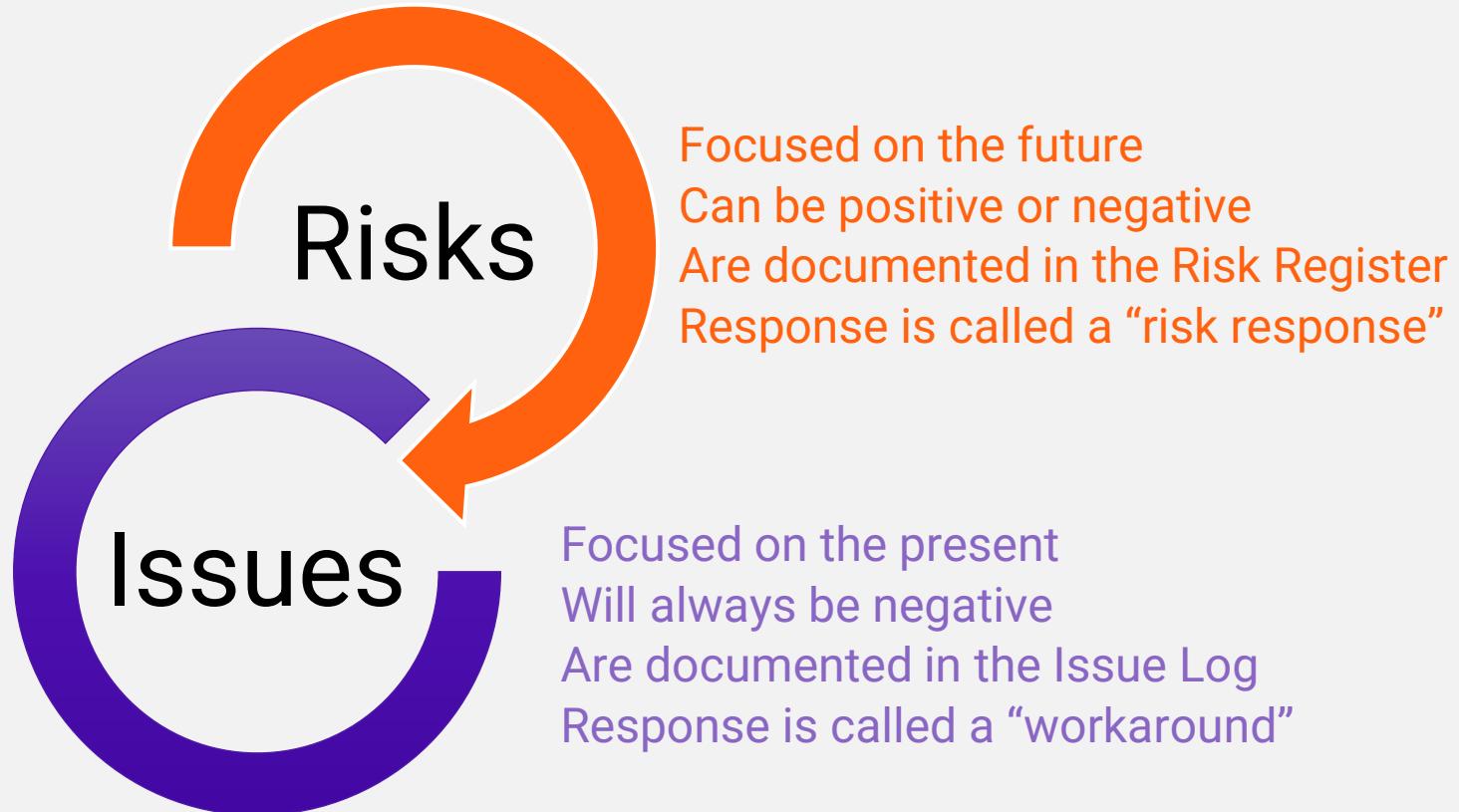


No specific tools

# Issues



# Risks and Issues



# Issue Log

ID	Description	Opened	Due Date	Priority	Owner	Response	Status	Comments
25	Truck strike	10/15/20xx	11/01/20xx	High	R. Smith	TBD	Open	Tasks are on the critical path

Manage  
Project  
Issues,  
LESSON 3,  
TOPIC G



Use it to track problems, inconsistencies, or conflicts that occur during the life of the project and require investigation in order to work toward a resolution.

# Issue Resolution

- ✓ As issues arise, promptly add them to the issue log.
- ✓ Assign an owner to each issue. The owner is responsible for tracking the progress of the workaround and reporting back.
- ✓ Give realistic due dates and make every reasonable attempt to meet it.
- ✓ Issues should be a regular topic of every status meeting.
- ✓ Limit the number of open issues to a manageable number.
- ✓ Don't hesitate to escalate an issue to the project sponsor if it begins to have a major effect on the project.



## GUIDELINES

# Resolving Issues

- Use your organization's Issue Log template; in the absence of one, create an Issue Log.
- Train project team members to promptly report potential issues.
- Enter the issue into the Issue Log and assign an owner and a due date.
- Monitor progress and discuss each open issue at every project status meeting.
- Develop a response (also known as a workaround) to the issue.
- Assess the impact of the response.
- Approve the response.
- Close the issue.

Manage  
Project  
Issues,  
LESSON 3,  
TOPIC G





# Ensure Knowledge Transfer For Project Continuity

TOPIC H

# Deliverables and Tools

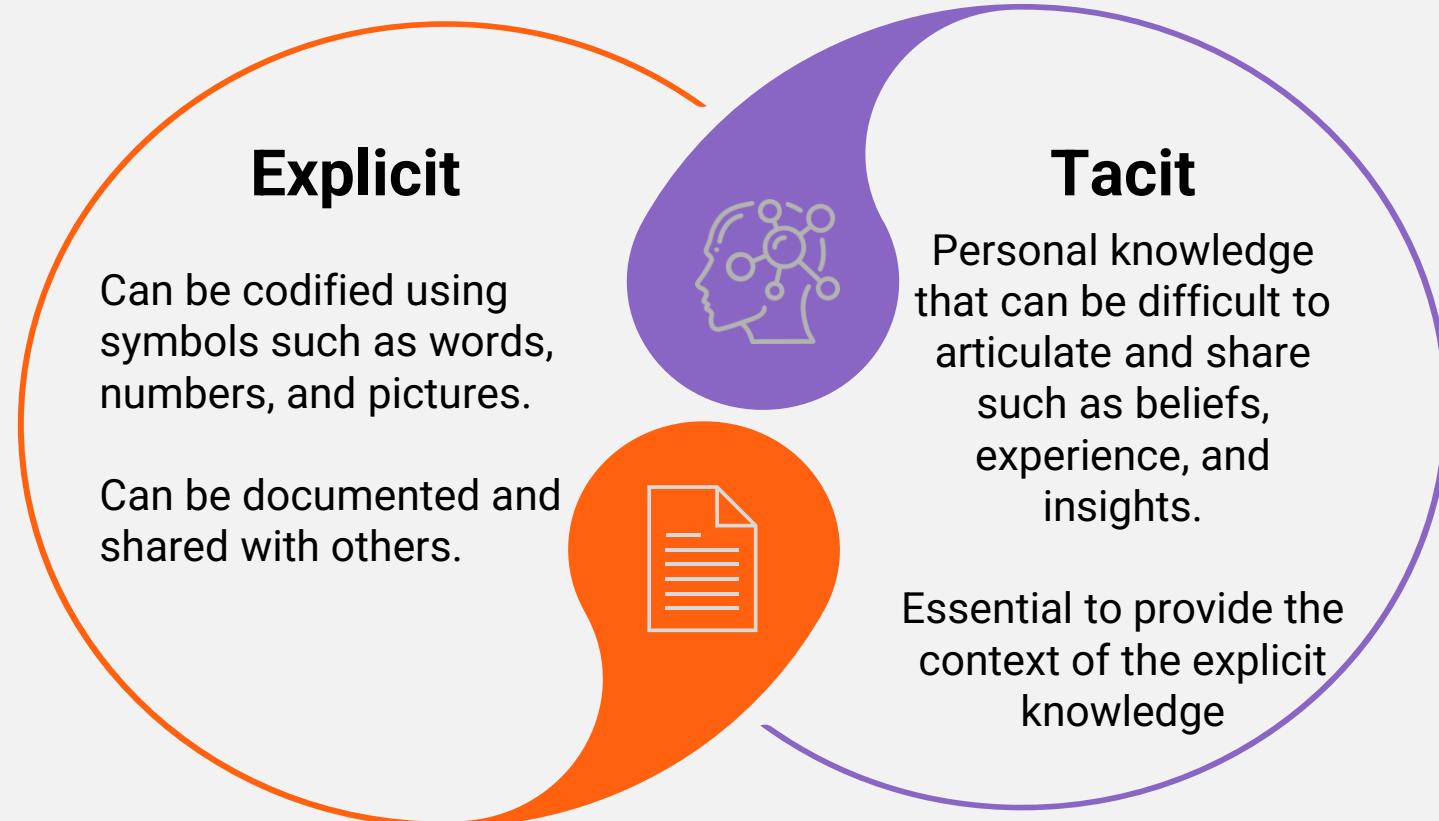


Lessons Learned Register



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"><li>• Research</li><li>• Collaboration with team members</li><li>• Examination of the project's or organization's knowledge repository</li></ul>
Project	<ul style="list-style-type: none"><li>• Focus on achieving the goals of the current project.</li><li>• Solicits knowledge about other projects that can be applied to the current project.</li><li>• 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.</li></ul>
Organization	<ul style="list-style-type: none"><li>• Focus on managing programs or portfolios.</li><li>• The program manager or portfolio manager seeks information from peers who manage other programs or portfolios, to adapt this knowledge to their specific need.</li></ul>

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





# 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.



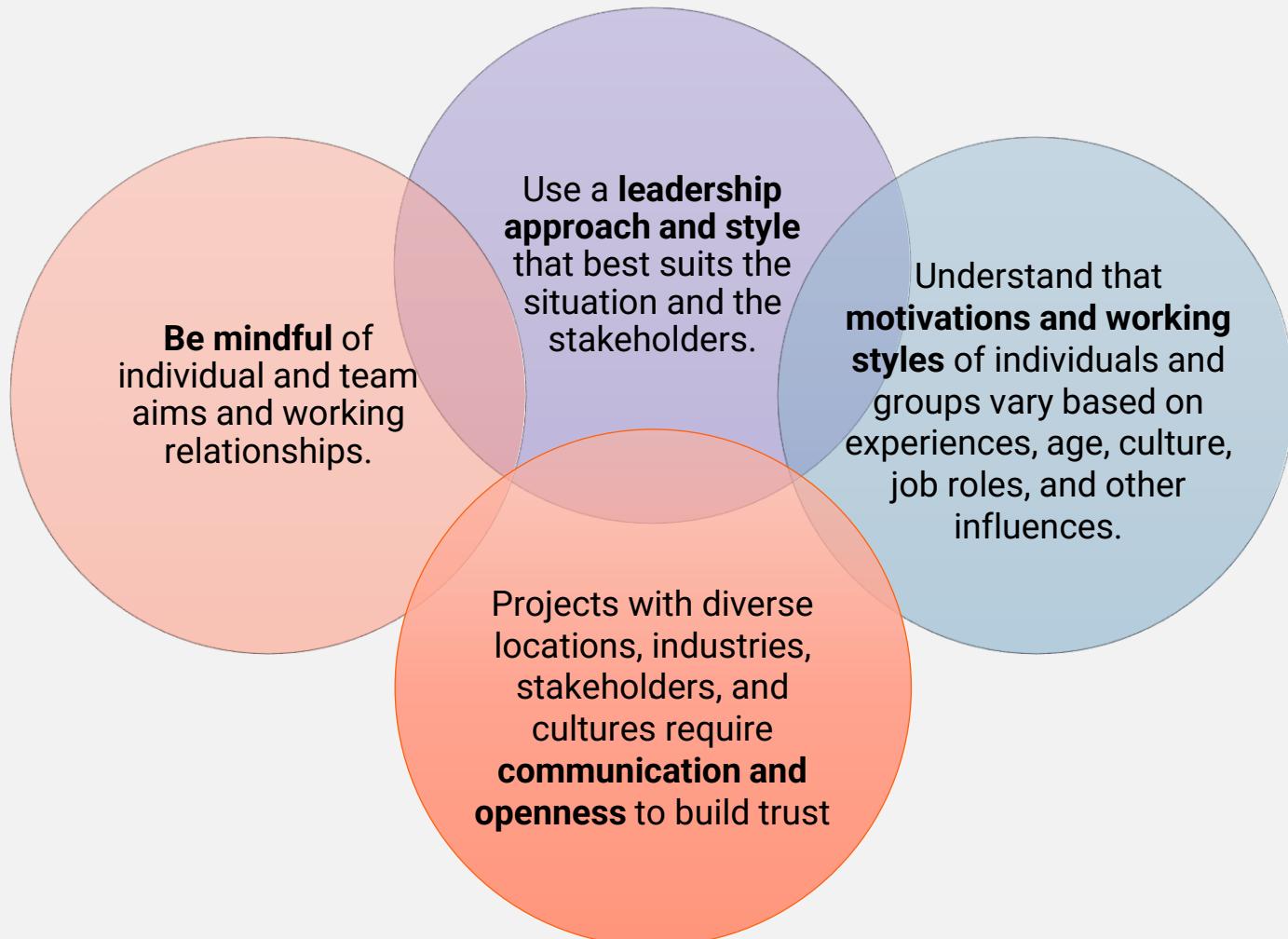


# Leadership Skills

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





## Challenge the Status Quo

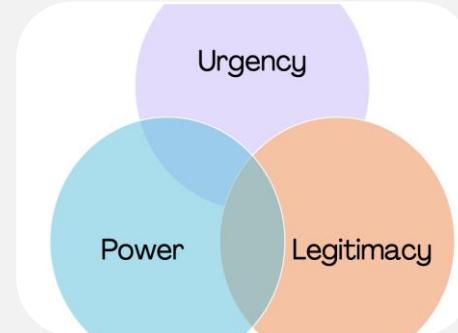
- ✓ Let past experiences and processes provide guidance to but not dictate your actions.
- ✓ Commit to a **growth mindset** to continuously improve and innovate, to find new ideas and perspectives.
- ✓ Discover the best approach through **challenge** and **introspection**.
- ✓ Avoid complacency and blind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

Lead a Team, LESSON 4, TOPIC A

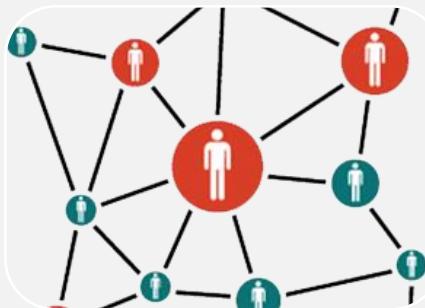
# Spotlight on Successful Persuasion

# 360 View of Stakeholders

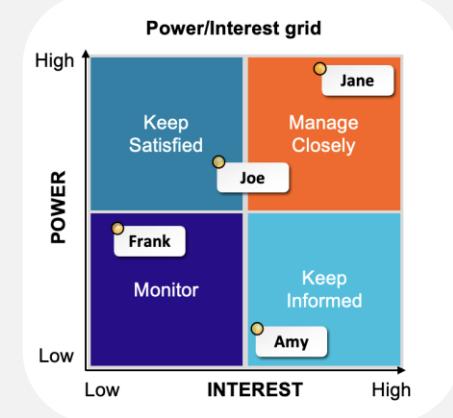
- ✓ Good leadership is based partially on your influence and the influence of the other project stakeholders.
- ✓ Use tools and techniques to ensure that you understand your stakeholders. Some examples:



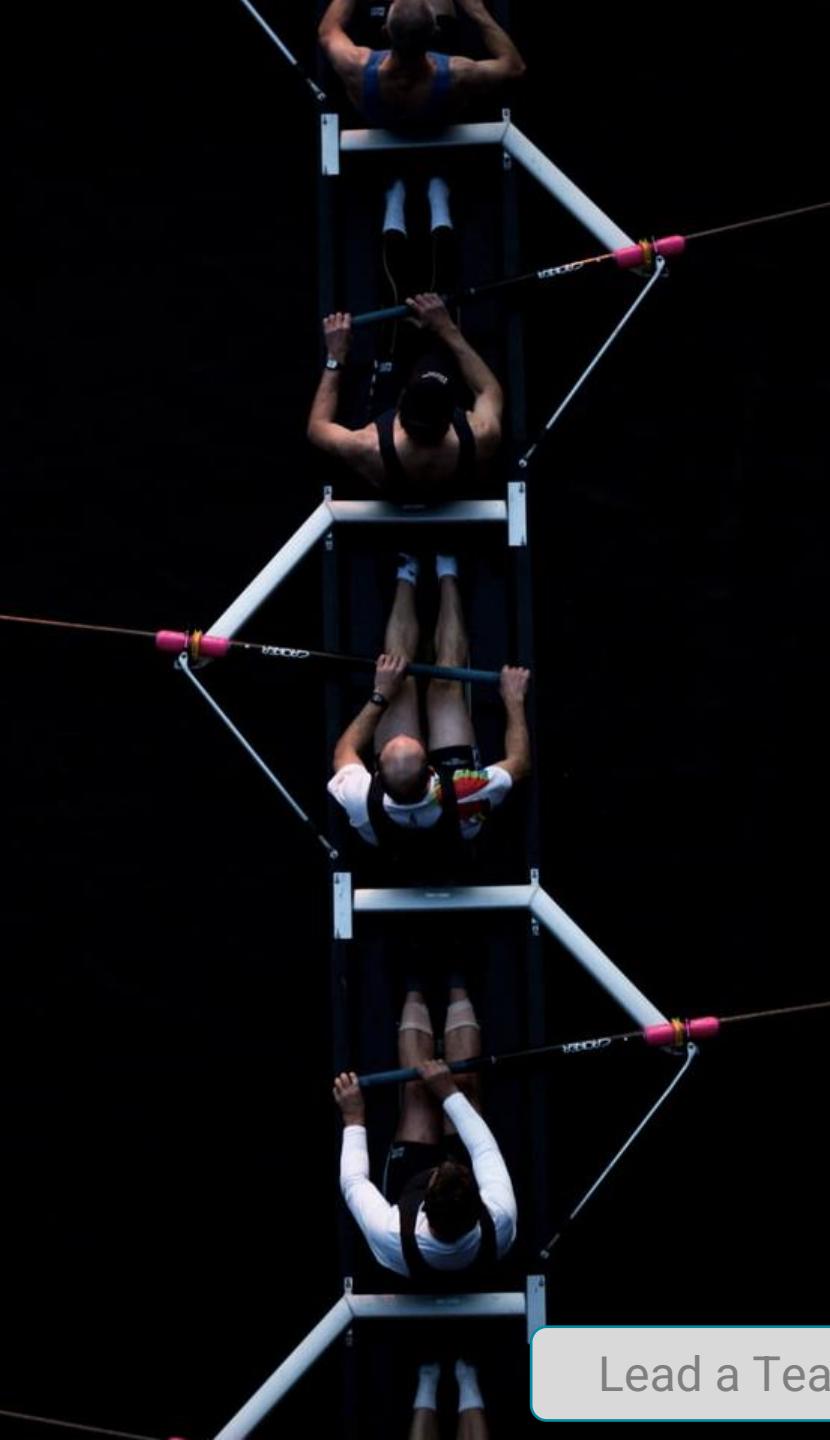
Salience Model



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

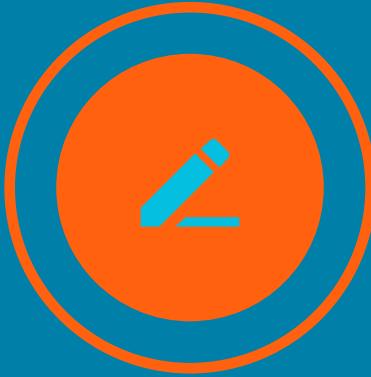
## GUIDELINES

# 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

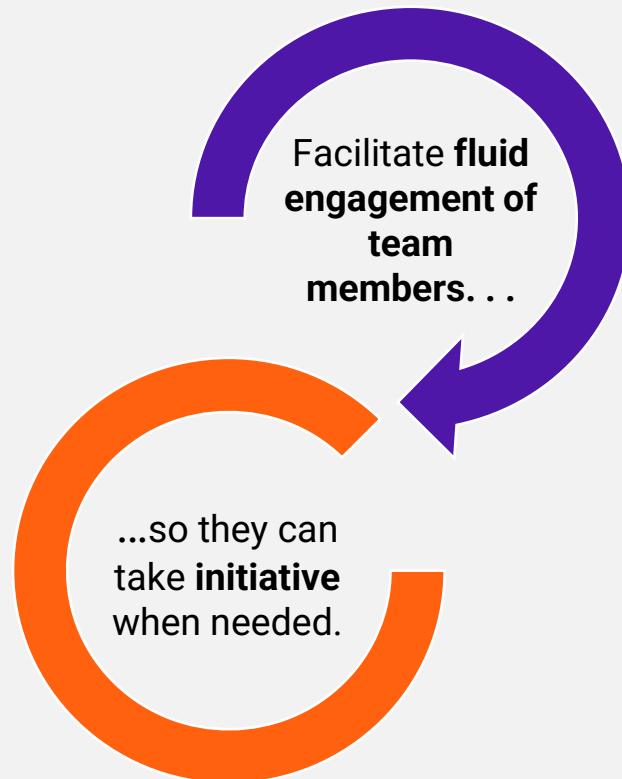
Strive to shape a team with a **healthy culture** of working **autonomy** and a shared **sense of responsibility** for their work.



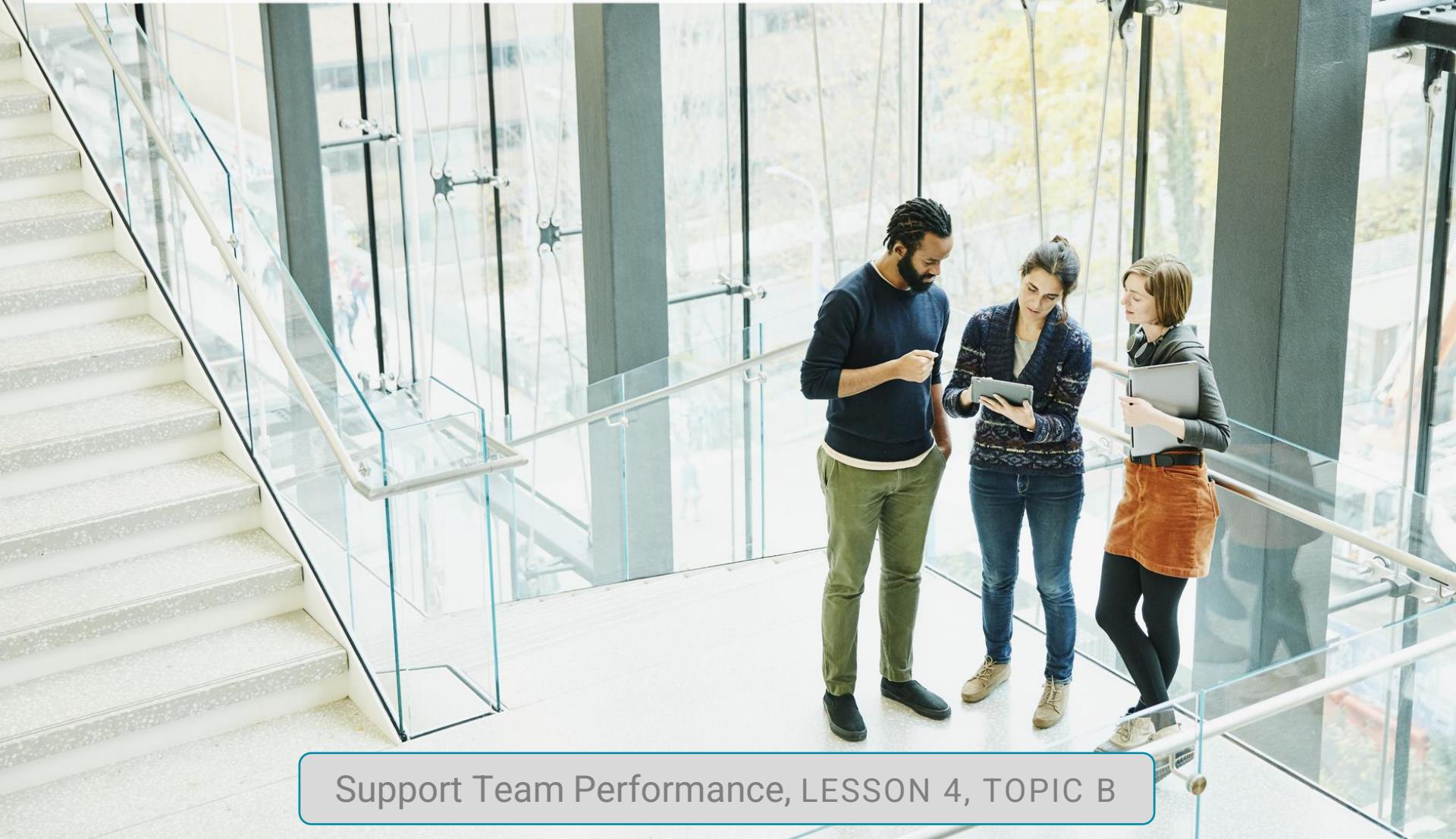
Support Team Performance, LESSON 4, TOPIC B

# 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.

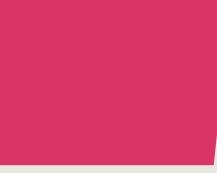
# Team Building Activities

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





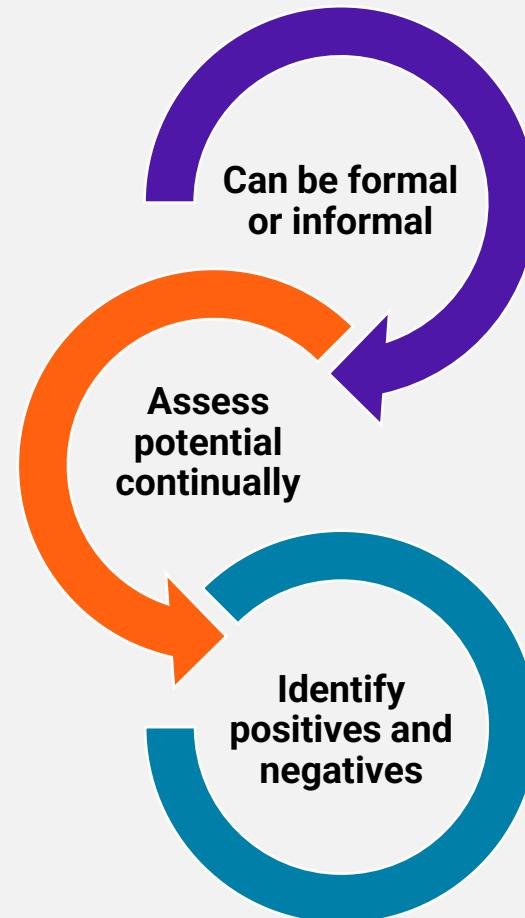
Use team-building activities to influence diverse individuals from many functional areas, each with their own goals, needs, and perspectives, to work as a cohesive team, for the good of the project.



# **Spotlight: Using Social Skills to Build Relationships**

# 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

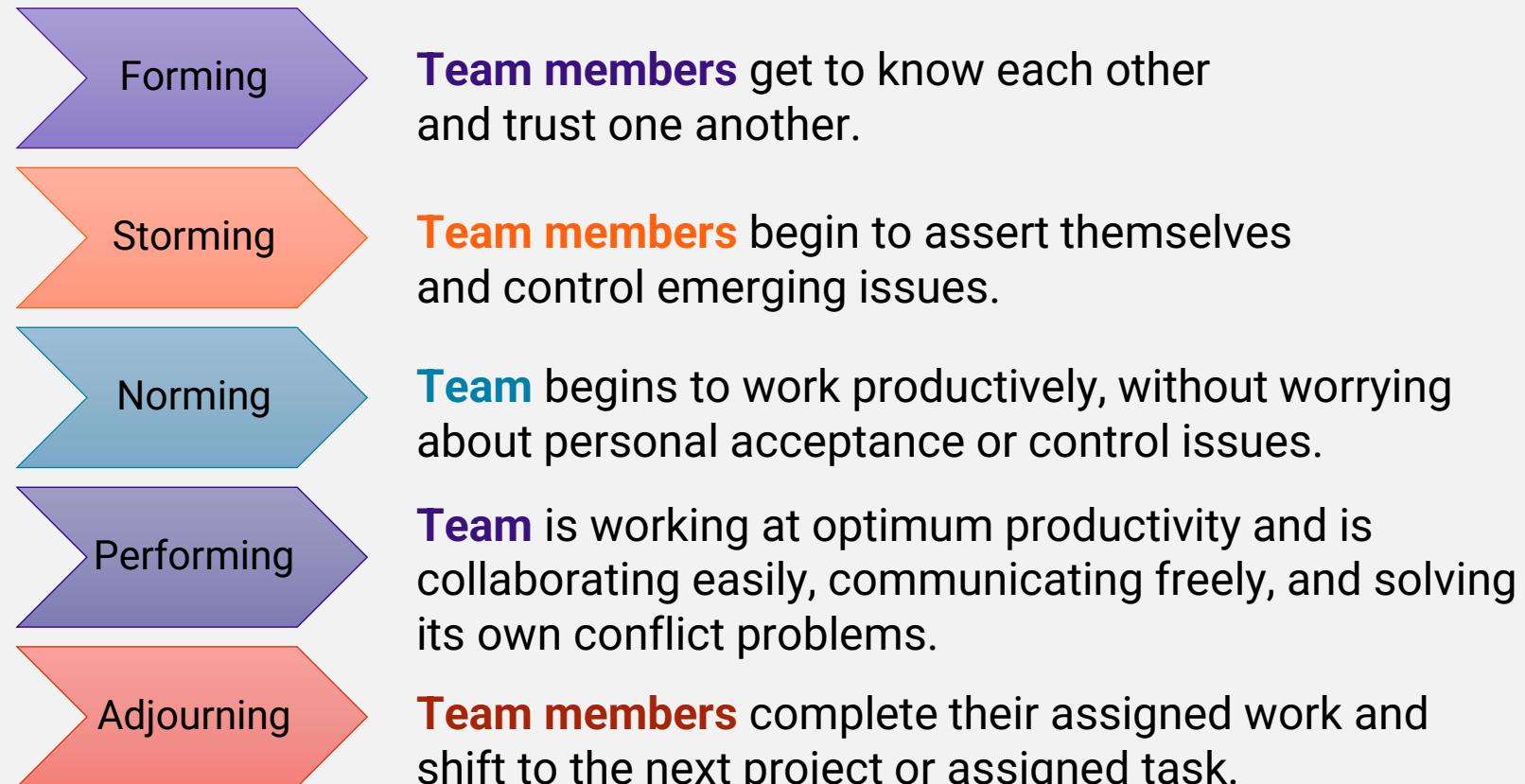




# Team Development

- ✓ 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**

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## **Stages of Personal and Team Development**



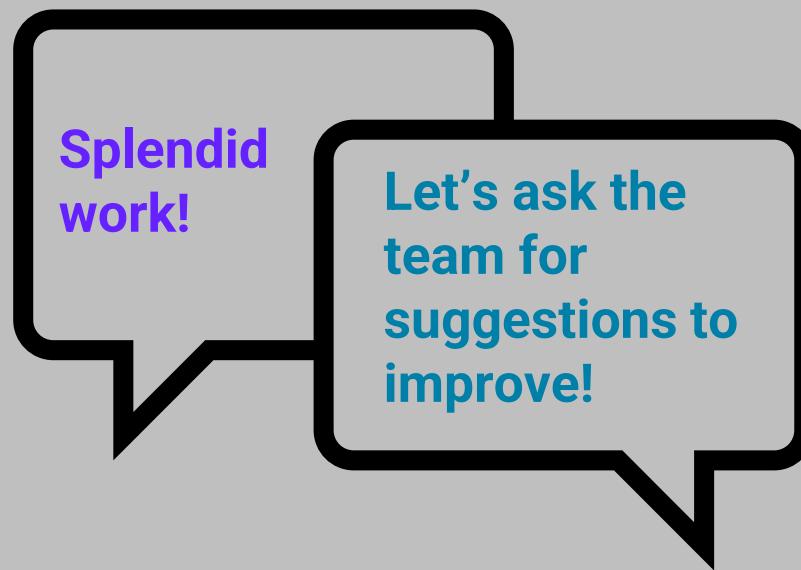
# Manage with Objectives

- ✓ 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



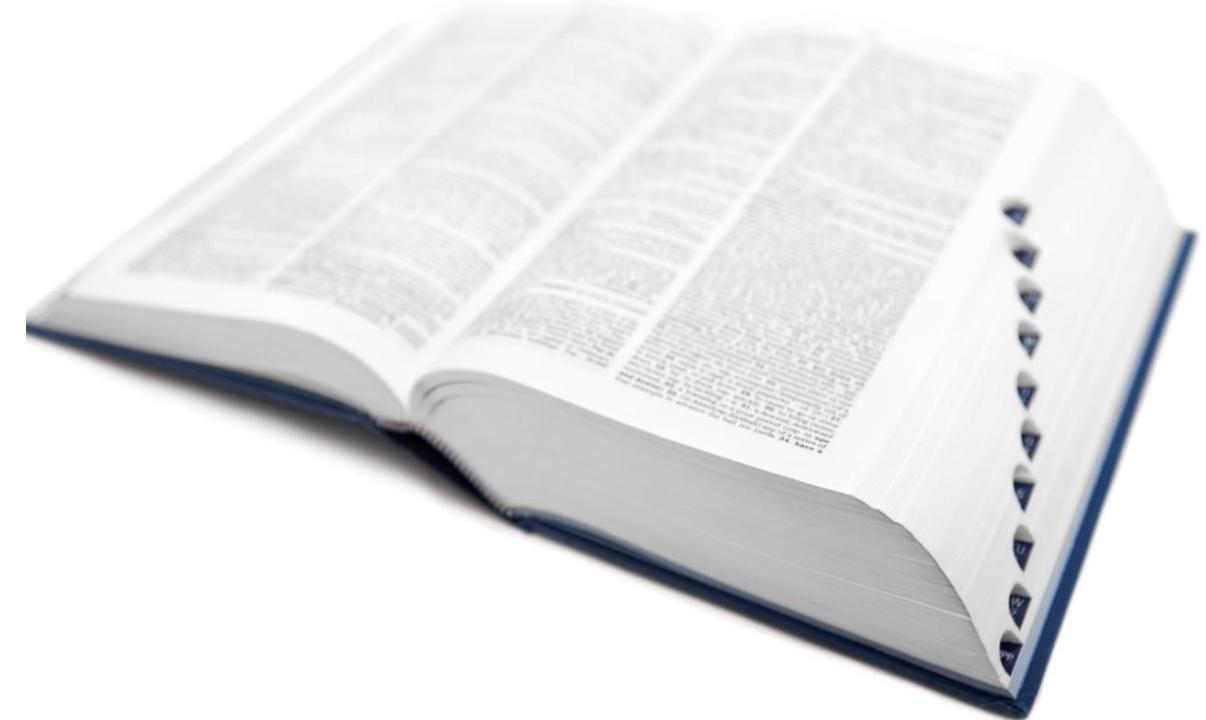
# Feedback

- ✓ 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.



# **VOCABULARY**

## FROM TODAY'S SESSION



# Communications Management Plan



## DEFINITION

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 Models



## DEFINITION

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

# Communication Methods



DEFINITION

A systematic procedure, technique, or process used to transfer information among project stakeholders.

# Stakeholder Engagement Assessment Matrix



DEFINITION

A matrix that compares current and desired stakeholder engagement levels.

# Configuration Management



DEFINITION

A tool used to manage changes to a product or service being produced as well as changes to any project documents.

# Configuration Management System



## DEFINITION

A collection of procedures used to track project artifacts and monitor and control changes to these artifacts.

# Version Control



DEFINITION

A system that records changes to a file in a way that allows you to retrieve previous changes made to it.

# Change Control Systems



DEFINITION

A set of procedures that describes how modifications to the project deliverables and documentation are managed and controlled.

# Change Control Board (CCB)



## DEFINITION

A formally chartered group responsible for reviewing, evaluating, approving, delaying, or rejecting changes to the project, and for recording and communicating such decisions.

# Approved Change Requests



## DEFINITION

Requests that have been received and approved in accordance with the integrated change control plan and are ready to be scheduled for implementation.

# Issues



## DEFINITION

A current condition or situation that may have an impact on the project objectives - an action item that the project team must address.

# Issue Log



## DEFINITION

A document where information about issues is recorded and monitored.

# Lessons Learned



## DEFINITION

The knowledge gained during a project which shows how project events were addressed or should be addressed in the future for the purpose of improving future performance.

# Lessons-Learned Register



## DEFINITION

A project document used to record knowledge gained during a project so that it can be used in the current project and entered into the lessons-learned repository.

# Lessons-Learned Repository



DEFINITION

A store of historical information about lessons learned in projects.

# Servant Leadership



## DEFINITION

The practice of leading through service to the team, by focusing on understanding and addressing the needs and development of team members in order to enable the highest possible team performance.

# DAILY BOOTCAMP SURVEY

**Please share your thoughts.**

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

**Thank you for attending Session 5!**