



PMP® EXAM PREP

PMI Authorized Training Partner

BOOTCAMP

Session 3

Attendance Alert

Percipio Users: Name is based
on your information in
Percipio

Using Zoom: Enter your first
and last name

PMP® Exam Prep

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

Scheduled Breaks



Session

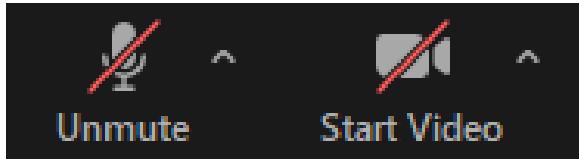
Periodic breaks

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

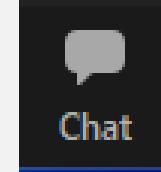


Ways to Participate in a Webinar

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



Find the Chat option in your Zoom command bar



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

To: Everyone ▾

Explore the Reactions option in your Zoom command bar



This is a fun way to provide quick and easy feedback

Using Zoom: Chat vs. Q&A

Please use the **Chat** to:

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

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

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

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

Upvoting in the Q&A

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

Great questions:

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

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

Accessing Your Bootcamp Resources – Percipio Users

Check Your Specific Bootcamp Channel for Your Resources

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

This Bootcamp provides Project Managers with the knowledge and skills needed to attain the Project Management Professional (PMP) certification. This course meets the 35-hour classroom requirement for...

[View More ▾](#)

PMP ATP: PMP ATP **PMP ATP is the Option for the Current Bootcamp**

Courses Books TestPrep Register and Join Sessions

Watch Read Practice Attend

Best Practices for attendance!

PMI requires your live attendance in class.

DOS

- The method used for joining the Bootcamp must include your first and last name
- Check to make sure your first and last name is correct in your Learning Portal
- If it's not, please reach out to Customer Support by emailing support@skillsoft.com and include

You are here!

COURSE | 8m 33s

PMP ATP Attendance 5-Day and 8-Day

Learn how attendance is tracked.

Bootcamp Documents and Other Files

Resources ▾

Accessing Your Bootcamp Resources - All Other Users

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

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

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

*Archive Resources Aug to Dec 2022	Add files via upload	3 days ago
*Archive Resources July 2022	Add files via upload	last week
5-Day Attendance and Certificates of...	Add files via upload	last week
Class Links	Add files via upload	last week
Documents (Syllabus, Exam Content ...)	Add files via upload	yesterday
Lunch Break Videos	Delete Placeholder	1 minute ago
PMP Learner Kit Information	Delete PMP ATP Learner Kit Info Jan 6 2023.pdf	3 days ago
Slide Decks	Delete Placeholder	yesterday
Vocabulary Slides	Delete Placeholder	yesterday

*Archive Resources Aug to Dec 2022	Delete Placeholder	3 days ago
*NA Cohort Aug Sep Oct 2022 Bootc...	Delete Test.txt	4 months ago
*NA Cohort Jun Jul Aug 2022 Bootca...	Delete Test	4 months ago
*UK and APAC Cohort Jul Aug Sep 20...	Delete Test.txt	4 months ago
8-Day Attendance and Certificates of...	Delete Placeholder	3 days ago
Class Links	Add files via upload	4 days ago
Documents (Syllabus, Exam Content ...)	Add files via upload	4 days ago
PMP Learner Kit Information	Delete Placeholder	4 days ago
Slide Decks	Create Placeholder	3 days ago
Vocabulary Slides	Create Placeholder	3 days ago

Logging In with Correct Name for Attendance

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

Issues With Staying Connected

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

IS LIVE ATTENDANCE REQUIRED?

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

*Please see the Bootcamp calendar at <http://calendar.skillsoft.com/> for information about upcoming sessions.



IN CASE OF ABSENCE

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

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

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

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

pmpB00tcampReplay!

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

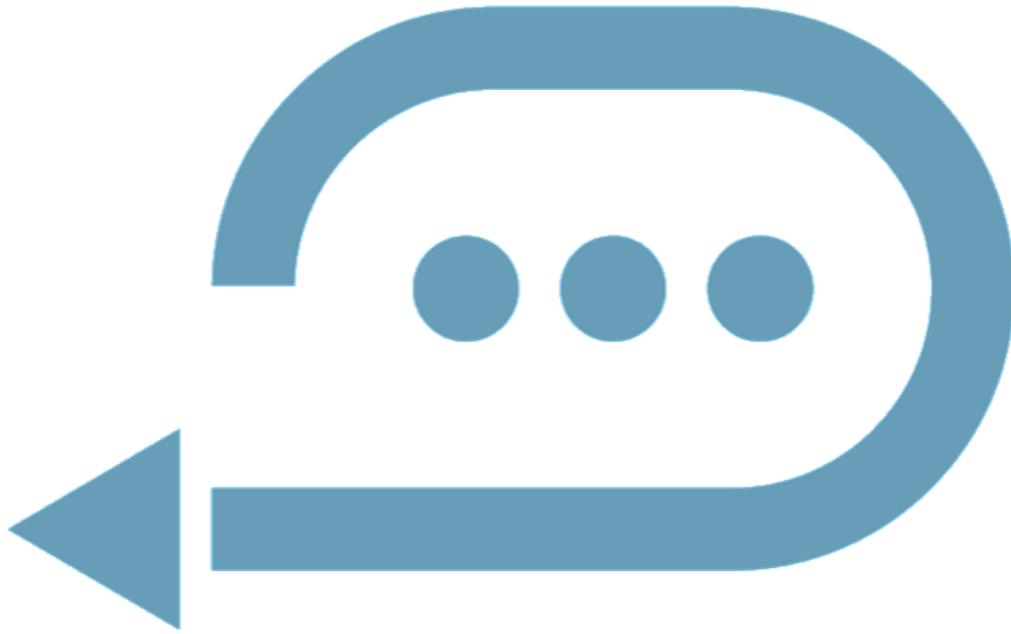
Note: The password to open the Excel file is NOT the passcode to access the replay.

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

NO LIMIT FOR REPLAYS:

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

Recap Session 2



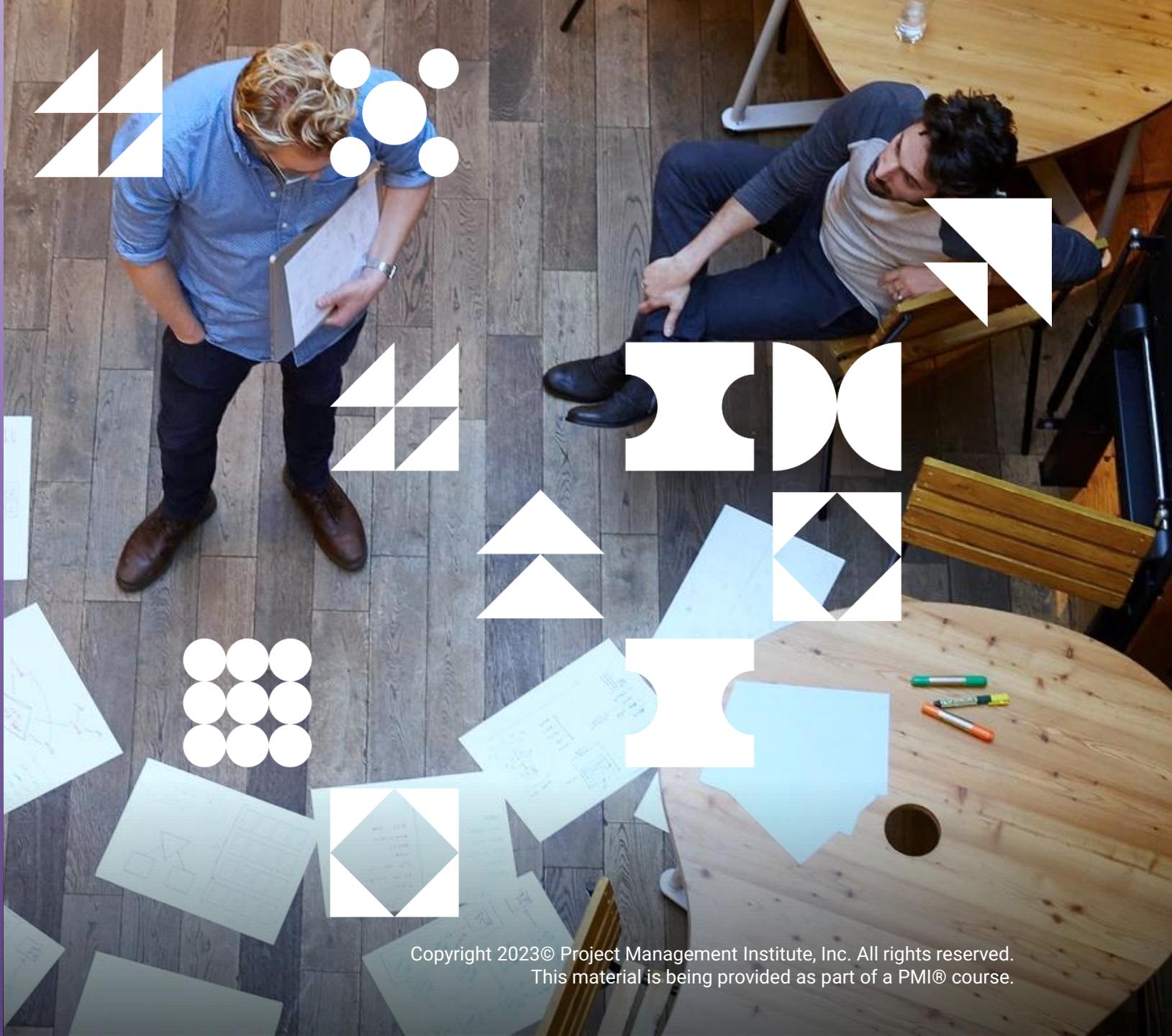
Mapping this course to the Student Workbook

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	(5B) Support Performance
Topic C	(1C) Project Benefits and Value	(2C) Build Shared Understanding	(3C) Schedule	(4C) Empower the Team	(5C) Evaluate Project Progress
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





Build Shared Understanding

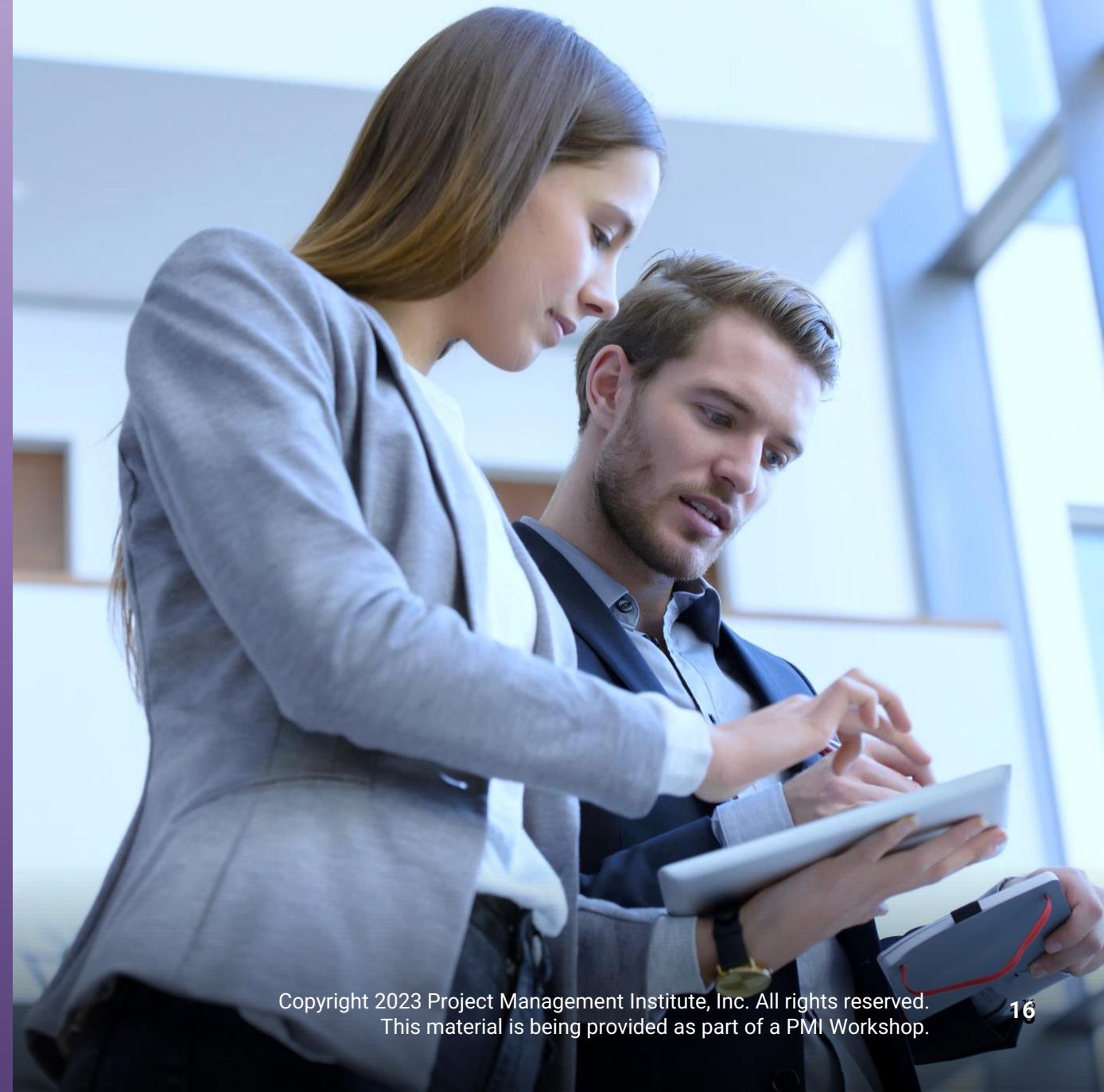
TOPIC C

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



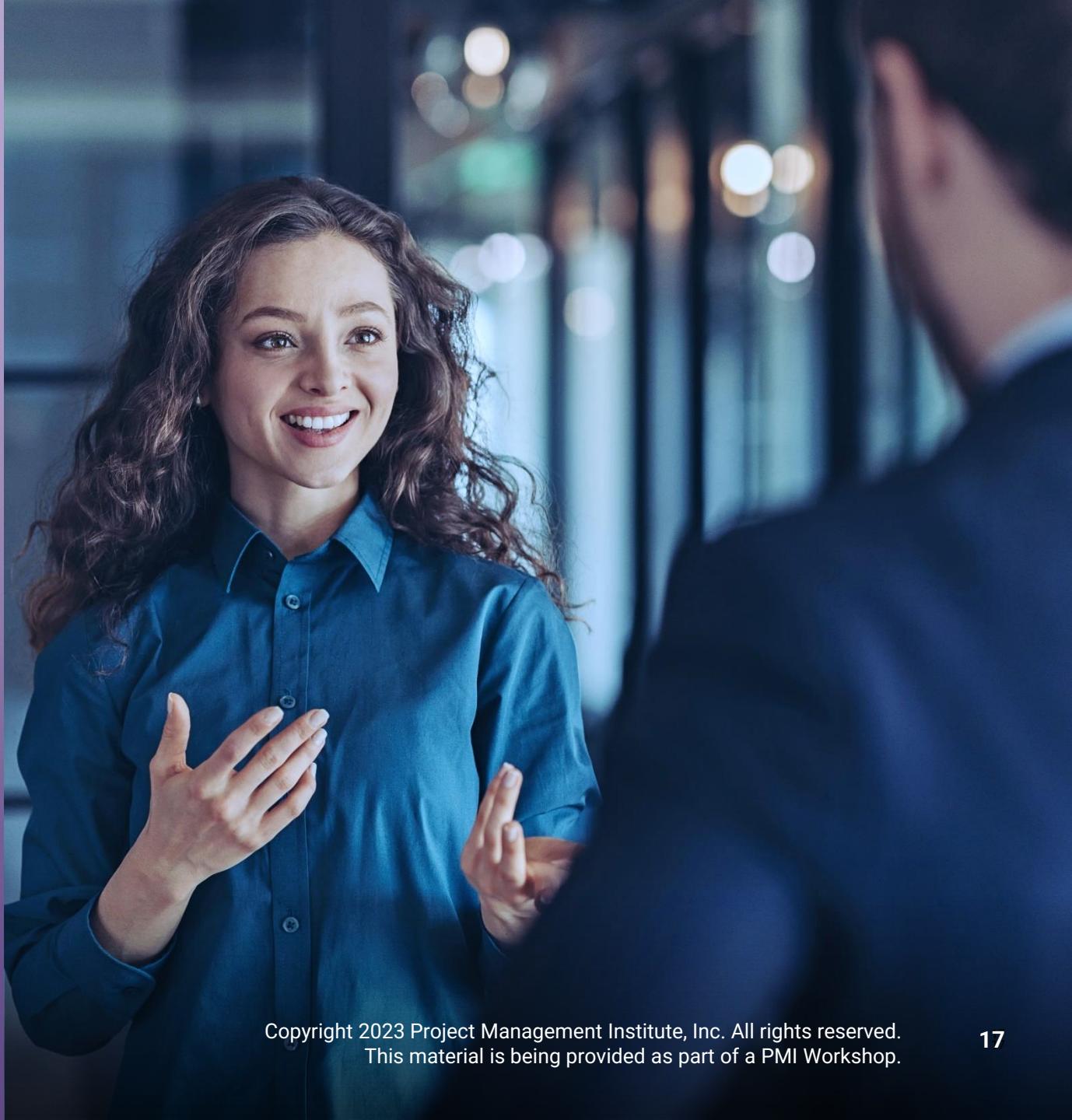
Building a Shared Understanding

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		
Shawpe Lifestyle Center (SLC)		
PROJECT MANAGER		
Ang Fen		
PROJECT SPONSOR		
Eugene Lowe		
EMAIL		
ang.fen@shawpe.com		
PHONE		
000.000.0000		
ORGANIZATIONAL UNIT		
Executive		
ESTIMATED COSTS		
\$10 Million		
EXPECTED SAVINGS		
\$0		
EXPECTED START DATE		
Jan 20XX		
EXPECTED COMPLETION		
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. Coordinate 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

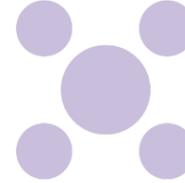
- Initiate product backlog



- Present product roadmap

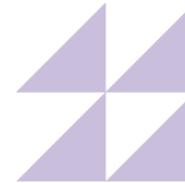
ECO Coverage

1.2 Lead a team



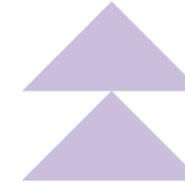
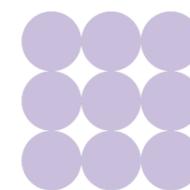
1.8 Negotiate project agreements

- Set a clear vision and mission (1.2.1)
- 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)



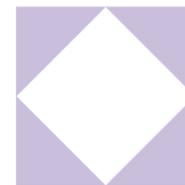
1.10 Build shared understanding

- 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

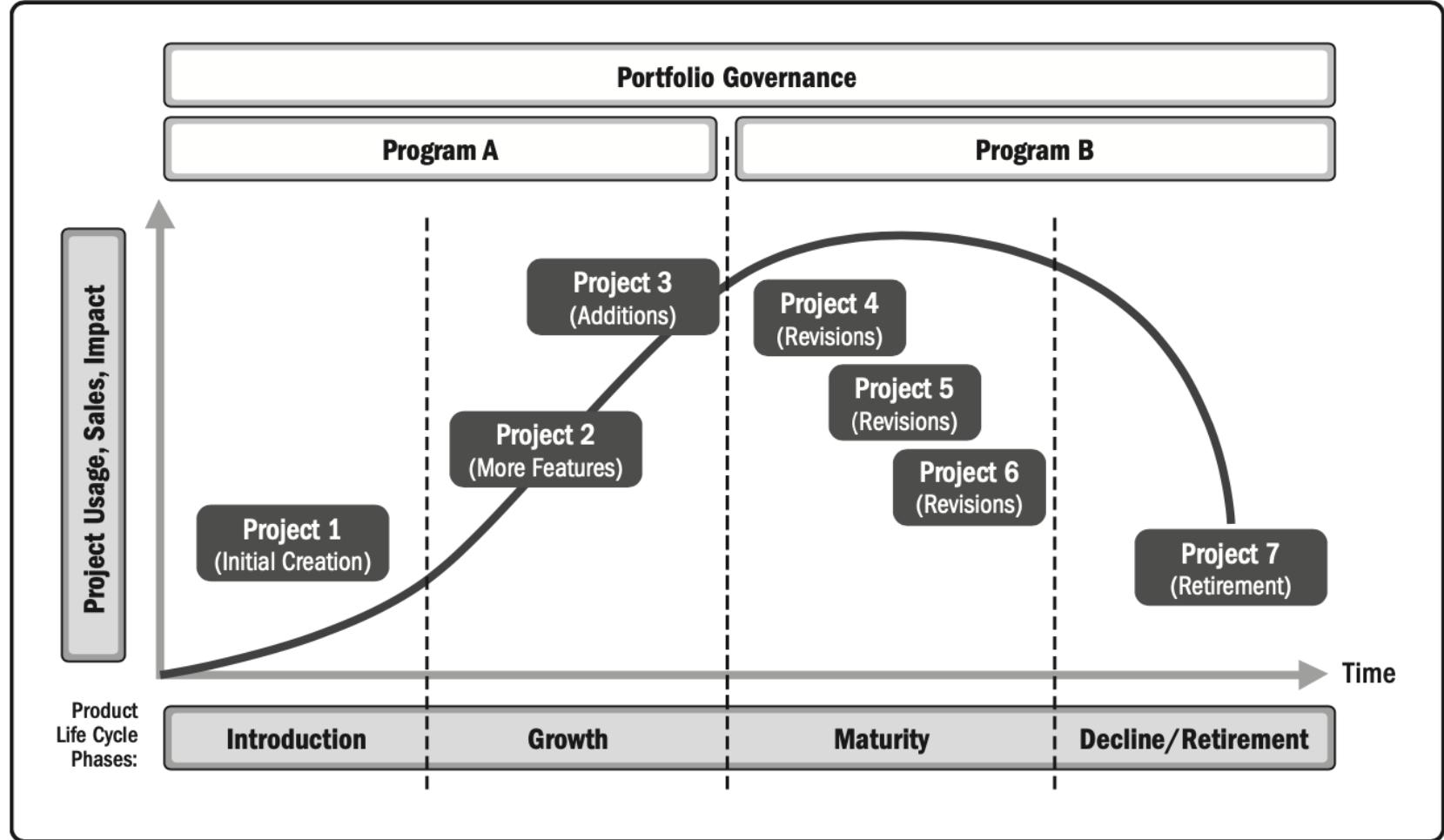
Characteristics	Certainty About Requirements	Change and Risk
 <ul style="list-style-type: none">• Plan-driven• Linear sequence of activities, in phases• Phase completion governed by phase gates	High, from beginning	<ul style="list-style-type: none">• Change possible, but controlled• Risks carefully studied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

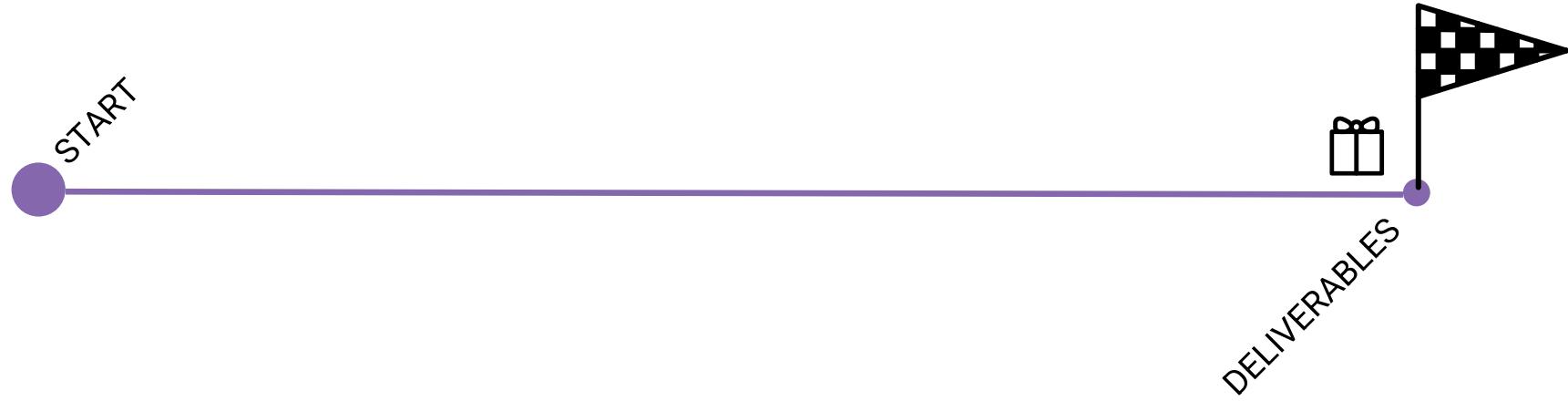


Can you explain why projects often have both a project manager and a product owner?

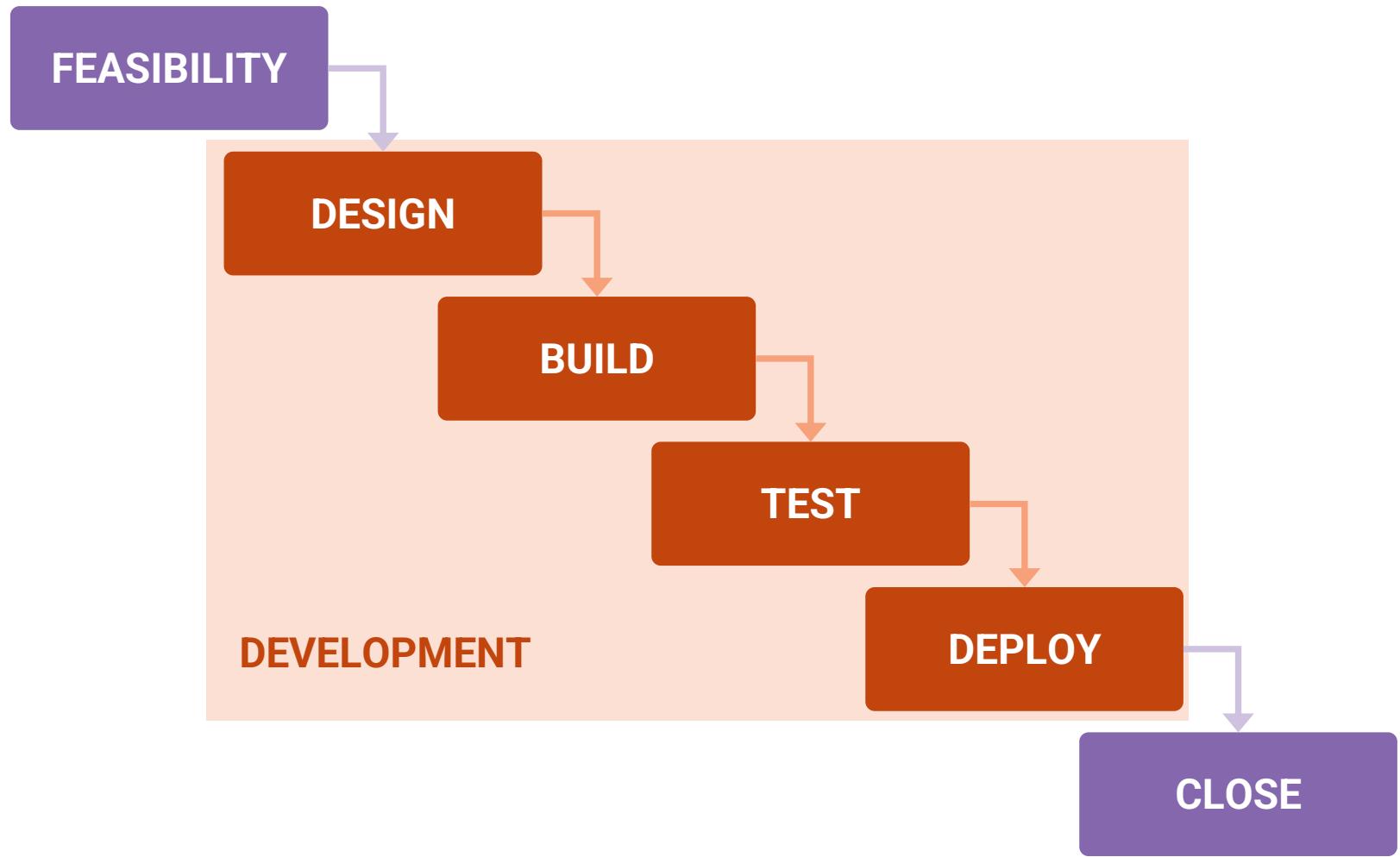
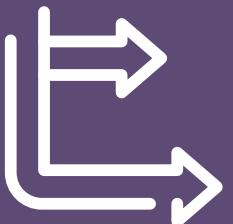
Life Cycle and Development Approach



Which type of life cycle is depicted here?



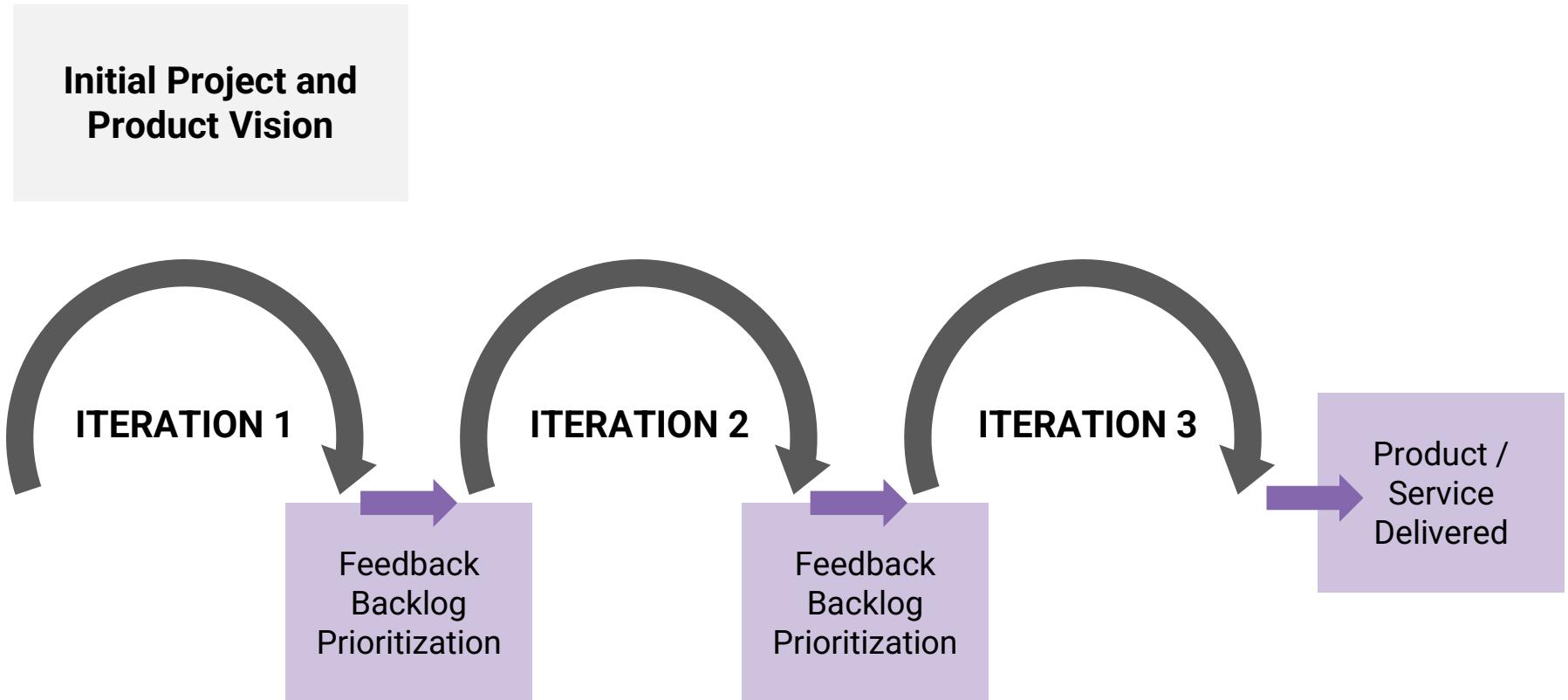
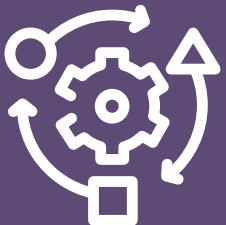
Predictive Life Cycle Visual



Adaptive Life Cycle Example



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



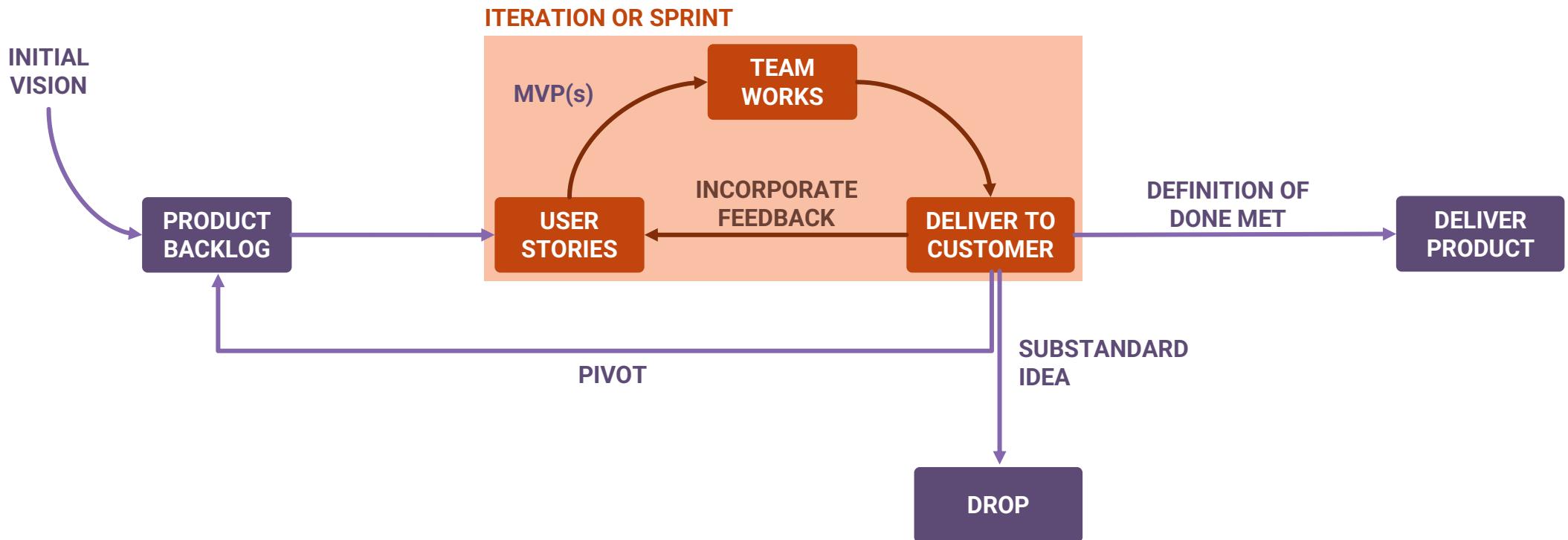
Cadence

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



-
- 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?



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

Development Approaches

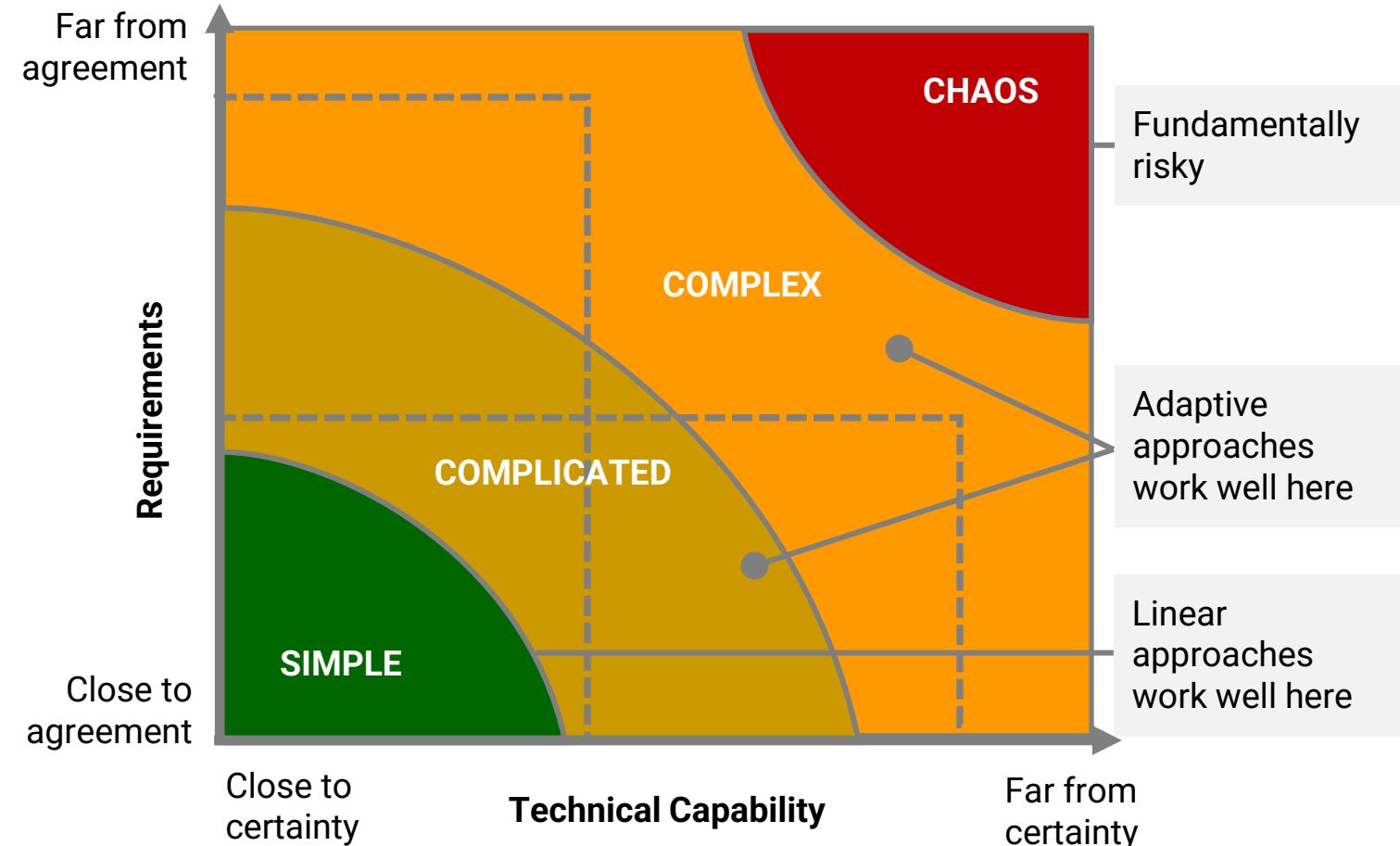
Guidance and Probing Questions

-
- 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?

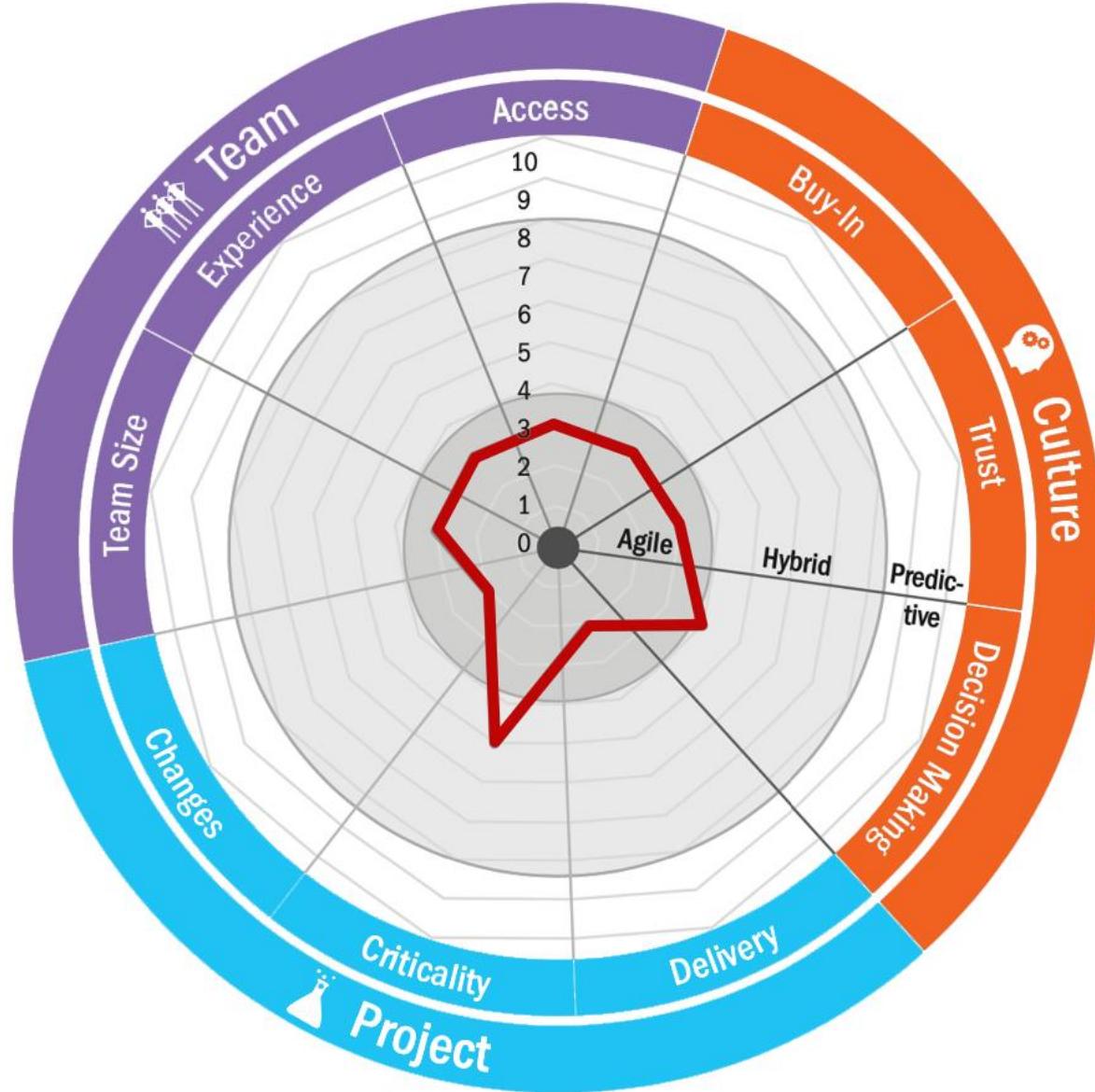
Assess Complexity: The Stacey Complexity Model

-Ralph D. Stacey

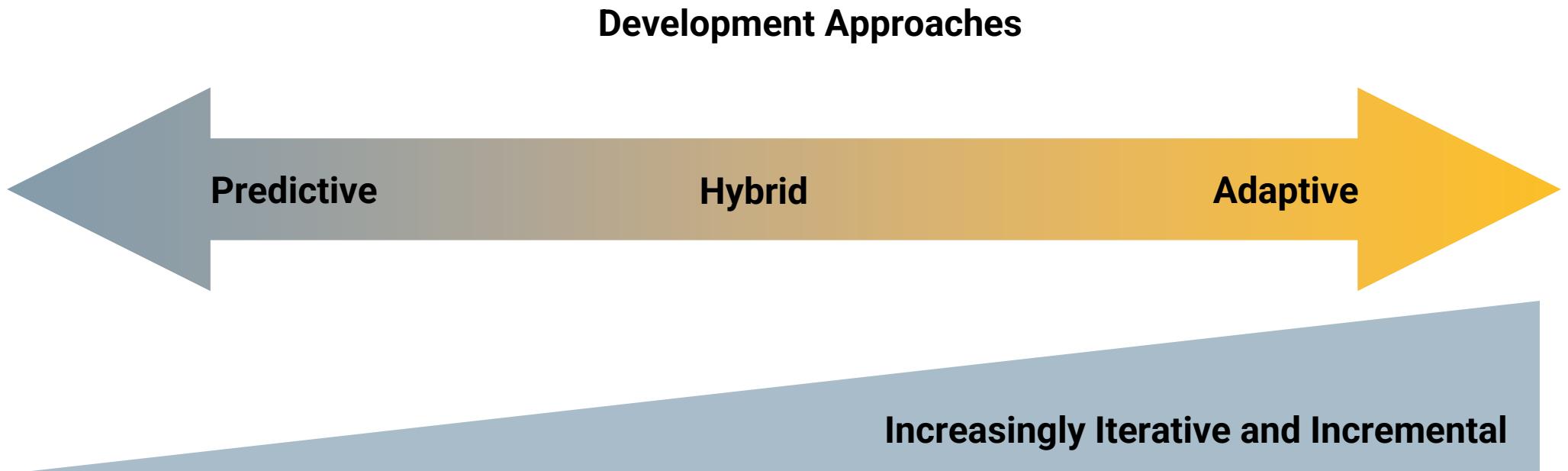


Suitability Filter:

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





-
- 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

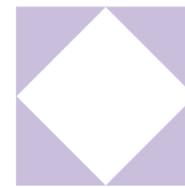
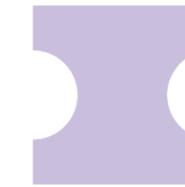
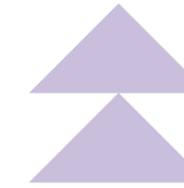
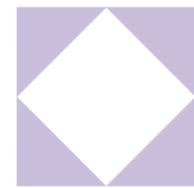
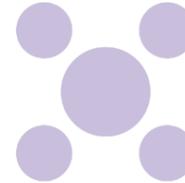
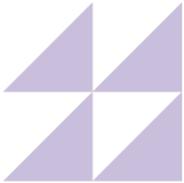
Agile Ceremonies



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

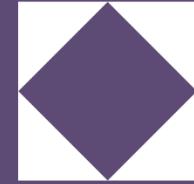
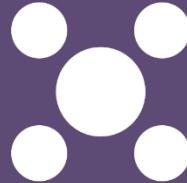
ECO Coverage



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*

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.

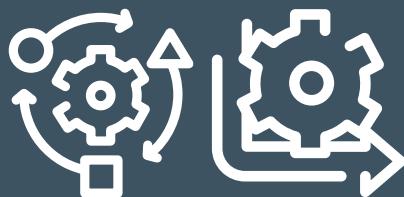


They are not components of the project management plan.

*See definition tab for list

Collaborative Planning

Adaptive and Hybrid Development Approaches



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

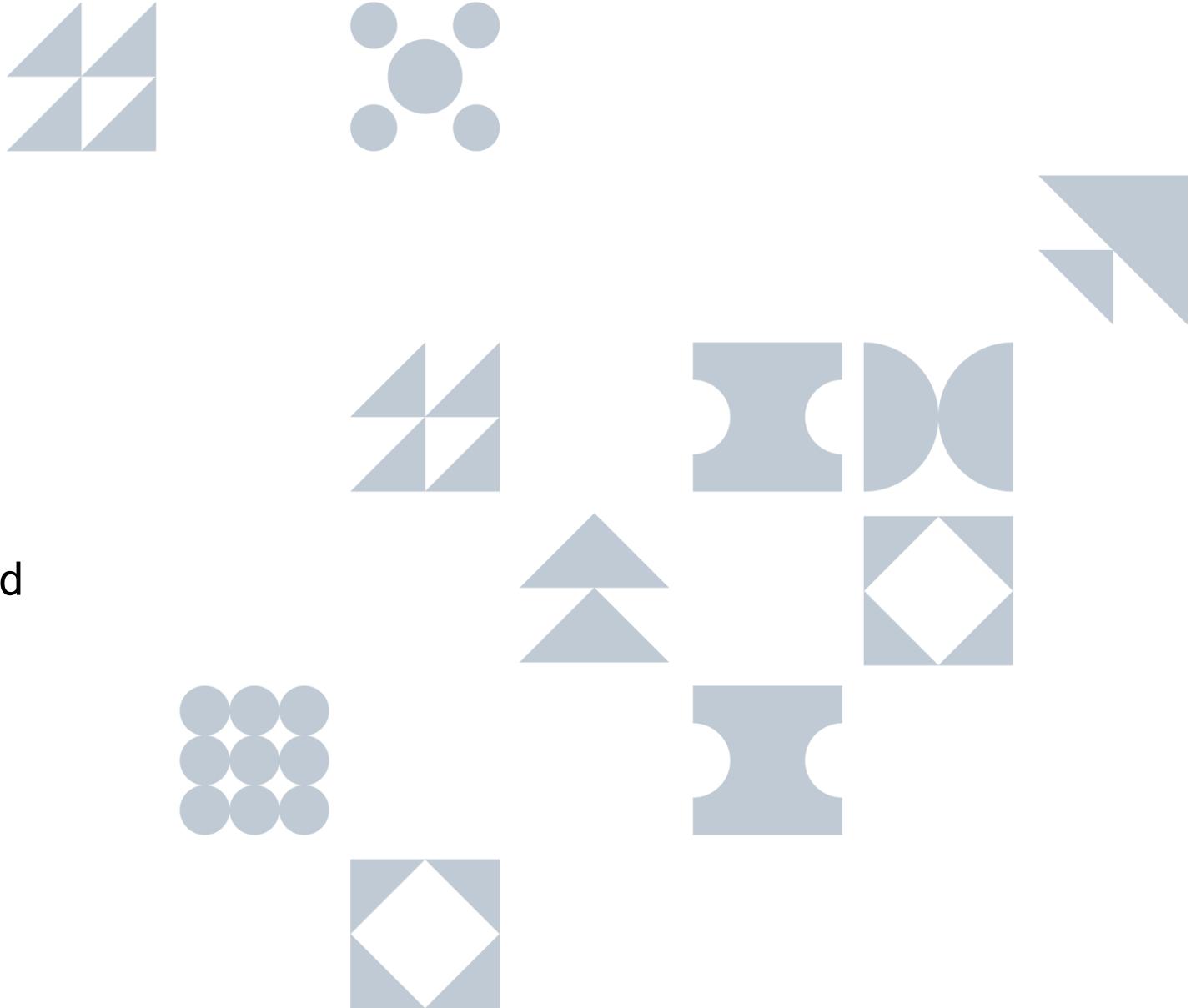
Project manager, team lead or scrum master helps focus the team to **execute the planned work**

Planning Across Life Cycles

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

Topic Coverage

Differentiation of planning in predictive and adaptive approaches





Scope

TOPIC B

Scope

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

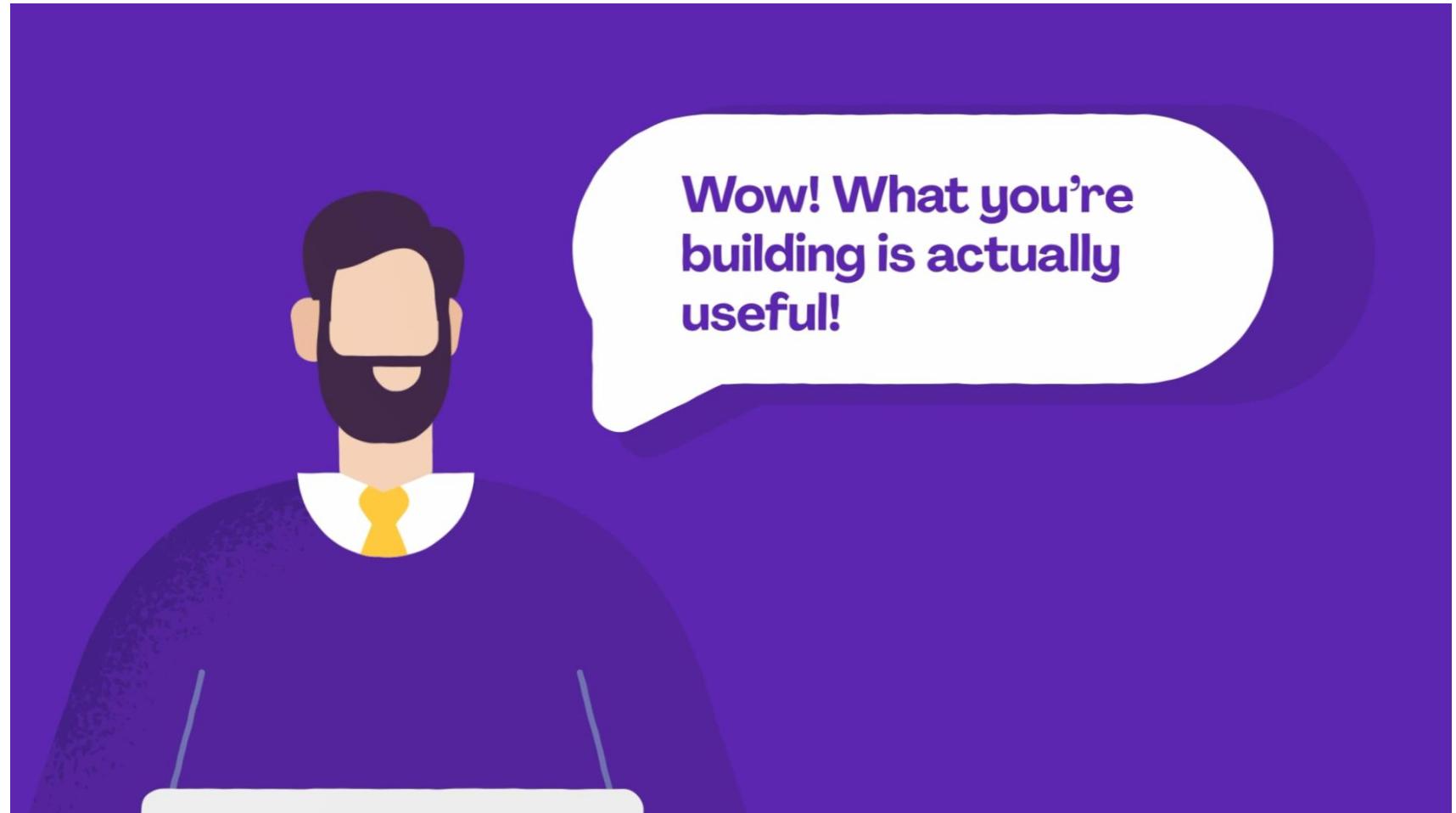
Rolling Wave Planning

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



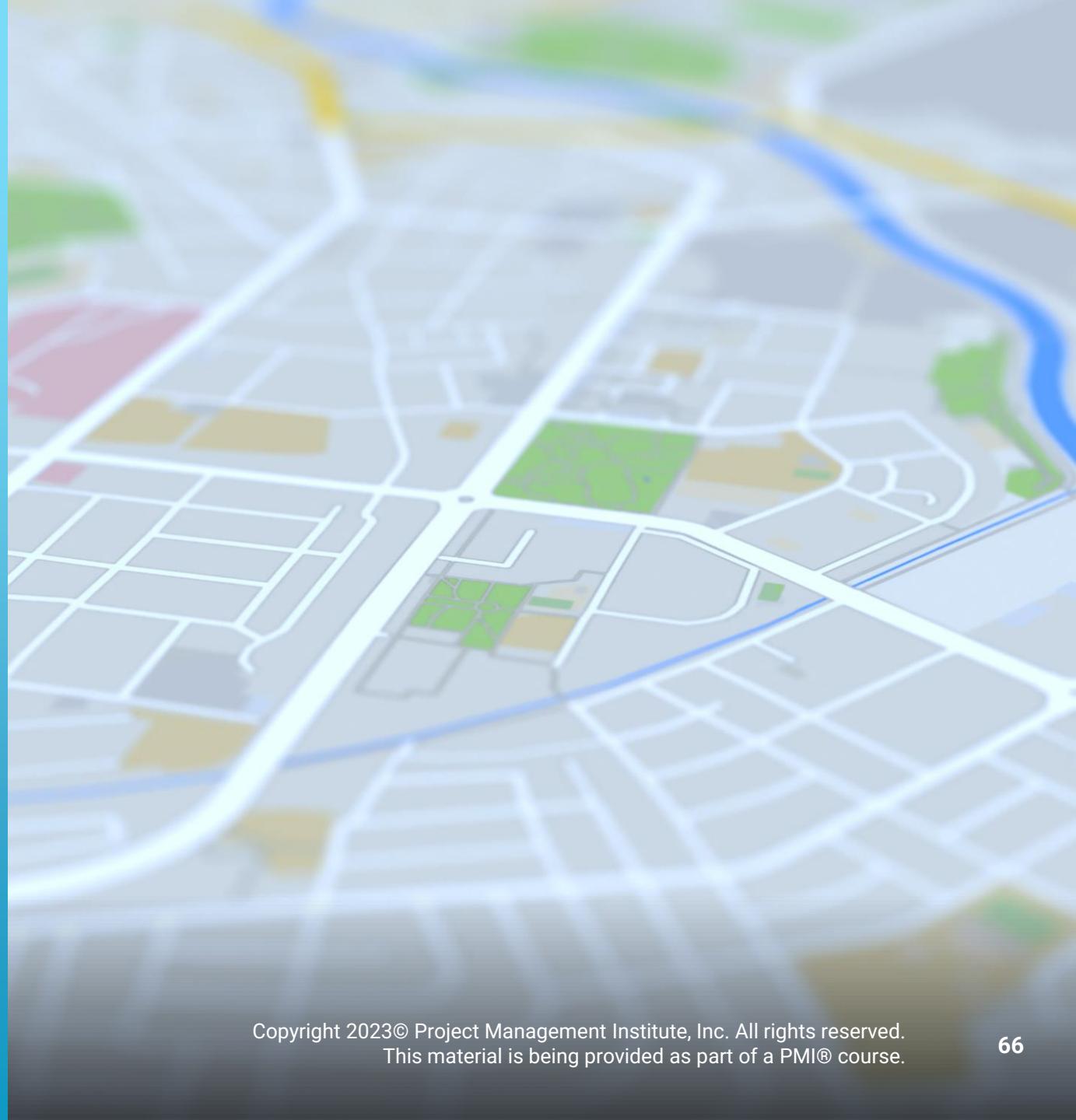
MVP or MBI?

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

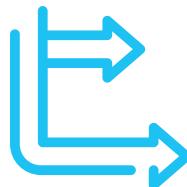


Get Started with Requirements?



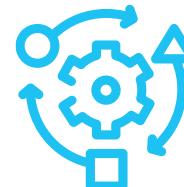
Does this kind of project start with requirements?

Click each button!



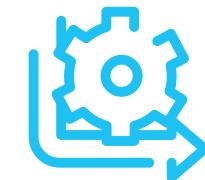
Yes!

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?



- A requirement is one single measurable statement of a condition or capability.
- It tells how a product, service or result satisfies a business need.

Guidelines for use:

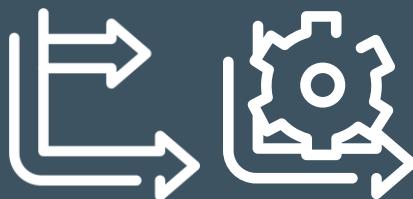


- *Start at a high level before providing details*
- *Must be unambiguous (measurable and testable), traceable, complete, consistent and acceptable to key stakeholders*

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								
	3.0								
003	3.1								
	3.2								
	4.0								
005	5.0								

Requirements Management Plan

Plan, Track and Report on Requirements Activities

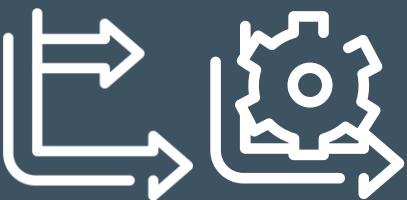


-
- Configuration management activities:
 - Version control rules
 - Impact analysis - tracing, tracking and reporting
 - Required authorization levels for change approval
 - Prioritization criteria/process
 - Product metrics and accompanying rationale
 - Traceability structure, including requirement attributes

Types of Requirements

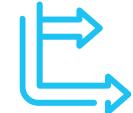
Type	Describes the...
Project	Actions, processes and conditions the project must meet
Product	Features and characteristics of the product, service or result that will meet the business and stakeholder requirements <ul style="list-style-type: none">• Functional – Product features• Nonfunctional - Supplemental environmental conditions/qualities that make the product effective
Quality	Conditions or criteria needed to validate the successful completion of a project deliverable or fulfilment of other project requirements
Business	Higher-level organizational needs, reasons for the project
Stakeholder	Stakeholder (or stakeholder group) needs –aka “Reporting requirements”
Transition/ Readiness	Temporary capabilities needed to transition successfully to the desired future state

Collect Requirements Process



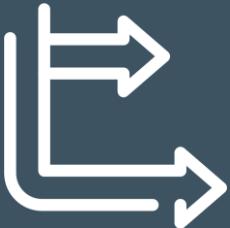
- Expert Judgment
- Interpersonal/Team Skills
 - Nominal group technique
 - Observation
 - Facilitation
- Data Gathering
 - Brainstorming
 - Interviews
 - Focus groups
 - Questionnaires and surveys
 - Benchmarking
- Data Analysis
 - Document analysis
 - Alternatives analysis
 - Product analysis (if deliverable is a product)
- Decision-Making Techniques
 - Voting
 - Multi-criteria decision analysis
- Data Representation
 - Mind mapping
 - Affinity diagram
 - Context or use case diagram
- Prototyping – e.g., **storyboarding**

Scope Planning: How to Collect Requirements



	Interviews	Questionnaires/Surveys	Observations	Focus Groups	Facilitated Workshops
Characteristics	<ul style="list-style-type: none"> Identify/define features and functions of deliverables Can be structured, unstructured or asynchronous 	<ul style="list-style-type: none"> Written format Captures information from large groups Yields quantitative data 	<ul style="list-style-type: none"> Physical technique used learn about a specific job role, task or function 	<ul style="list-style-type: none"> Casual/interactive information-sharing Moderator-guided Includes stakeholders and SMEs Yields qualitative data 	<ul style="list-style-type: none"> Sessions organized by project managers to determine requirements and enable stakeholder agreement on project outcomes
Advantages	<ul style="list-style-type: none"> Handles sensitive/confidential information Helps identify stakeholder requirements, goals or expectations 	<ul style="list-style-type: none"> Quick turnaround Effective with varied and geographically dispersed respondents Yields quantifiable data for statistical analysis 	<ul style="list-style-type: none"> Team can understand where changes might be beneficial 	<ul style="list-style-type: none"> Pre-selected participants for varied opinions Small group for focused approach and gathering specific information 	<ul style="list-style-type: none"> Team can capture requirements Stakeholders can understand the concerns and requirements of others
Considerations (potential drawbacks)	<ul style="list-style-type: none"> Captures only a single point of view 	<ul style="list-style-type: none"> Time consuming Answer/ data quality depends on question quality 		<ul style="list-style-type: none"> Must prequalify stakeholders SMEs and facilitation are essential 	<ul style="list-style-type: none"> Facilitation is essential

Data Gathering



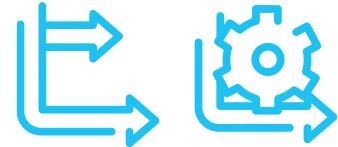
Use **Benchmarks** to generate product requirements

- Requires best practices to make comparisons
- Evaluates and compares an organization's or project's practices with others
- Identifies best practices in order to meet or exceed them



- *Can you remember the other methods for data gathering?*
- *Why do you think benchmarking is effective in gathering data for scope planning?*
- *Why would you choose it instead of the other methods?*

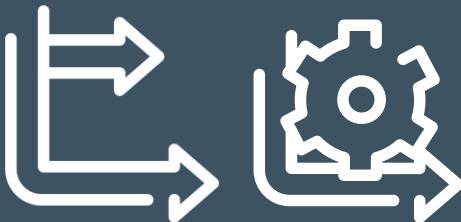
Scope Planning – Requirements Prioritization



Tool or Technique	Description	Benefits
MoSCoW Analysis <i>(developed by Dai Clegg)</i>	Used to reach a common understanding with stakeholders on the importance of each requirement. They indicate: <ul style="list-style-type: none">• M - Must have• S - Should have• C - Could have• W - Won't have (for now)	<ul style="list-style-type: none">• Compares several points of view• Used with timeboxing to focus on the most important requirements• Common in agile software development, Scrum, RAD and DSDM
Kano Model <i>(Product management technique)</i> <i>(developed by Noriaki Kano)</i>	Understand and classify all potential customer requirements or features into four categories of need: <ul style="list-style-type: none">• Delighters/exciters• Satisfiers• Dissatisfiers• Indifferent	<ul style="list-style-type: none">• Development efforts can then be prioritized by the things that most influence customer satisfaction and loyalty.
Paired Comparison Analysis <i>(developed by LL Thurston)</i>	Rate and rank alternatives by comparing one against the other	<ul style="list-style-type: none">• Good for small range of subjective requirements
100 Points Method <i>(aka fixed sum or fixed allocation method)</i> <i>(developed by Dean Leffingwell and Don Widrig)</i>	Vote for importance of requirements in a list; stakeholders distribute 100 points in any way they wish (Like "Monopoly money" method)	<ul style="list-style-type: none">• Good for any size group, even large ones• Gives priority to stakeholder decision-making because they must exercise depth of thought

Represent Data

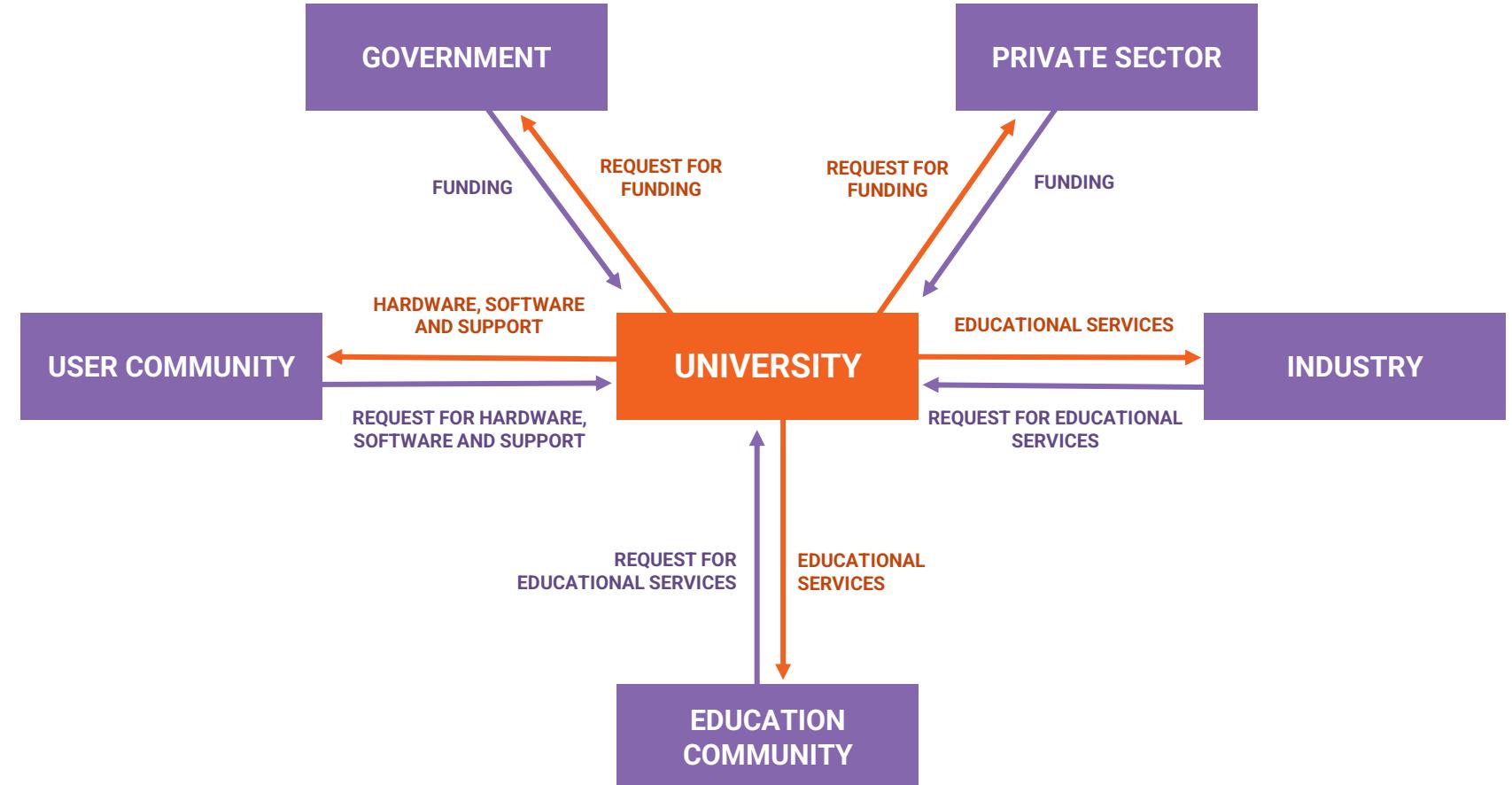
- **Mind Mapping** – Consolidate ideas created through individual brainstorming sessions into a single map to reflect commonality and differences in understanding and to generate new ideas
- **Affinity Diagram** – Allows large numbers of ideas to be classified for review and analysis



Context Diagrams*



Business Context Diagram Example



Prototyping

- **Evaluation and experimentation tool**
- Enables early feedback for further development and **to develop a detailed list of project requirements**
- **Storyboarding** is a type of **prototyping** that uses visuals or images to illustrate a process or represent a project outcome.

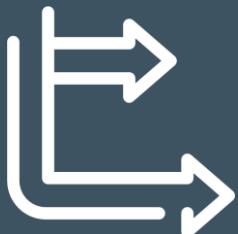


Scope Management Plan*



- Review of the scope activities for the project and how that work will be done
- Should include processes to prepare a project scope statement
- Enables the creation of the WBS from the detailed project scope statement
- Establishes how the **scope baseline** will be approved and maintained
- Specifies how **formal acceptance** of the completed project deliverables will be obtained
- Can be formal or informal, broadly framed or highly detailed

Project Scope Statement



Includes –

- Scope description - project and product
- Acceptance criteria
- Any required deliverables
- Any out-of-scope items needed for clarification
- Constraints and assumptions



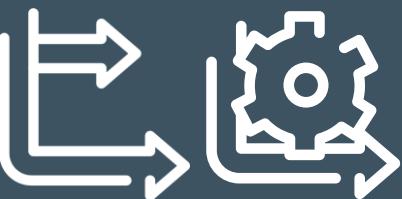
Once it has been approved and baselined, changes are only permitted in accordance with the change management plan.

Scope Planning

Tools and Techniques for Analysis



Match the requirements analysis tool/technique with the correct description.



Document analysis

Used to consider possible potential options or approaches to execute and perform project work

Alternatives analysis

Analyze the information needed to develop the project scope statement or any technical detail

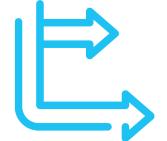
Product analysis

Derive new project requirements from existing documents

Expert judgment

Ask questions about a product and form answers to describe use, characteristics, and other relevant aspects

Product Analysis Methods



PRODUCT BREAKDOWN

Splits a product and its requirements into components to achieve a clear understanding of work

SYSTEMS ENGINEERING

Approaches design, integration, and management, and the life cycle of complex systems in a multi-disciplinary way

SYSTEMS ANALYSIS

Studies a product /service to identify its goals and purposes and create systems/ procedures to achieve them efficiently

REQUIREMENTS ANALYSIS

Identifies, validates and documents specifications for projects

VALUE ENGINEERING

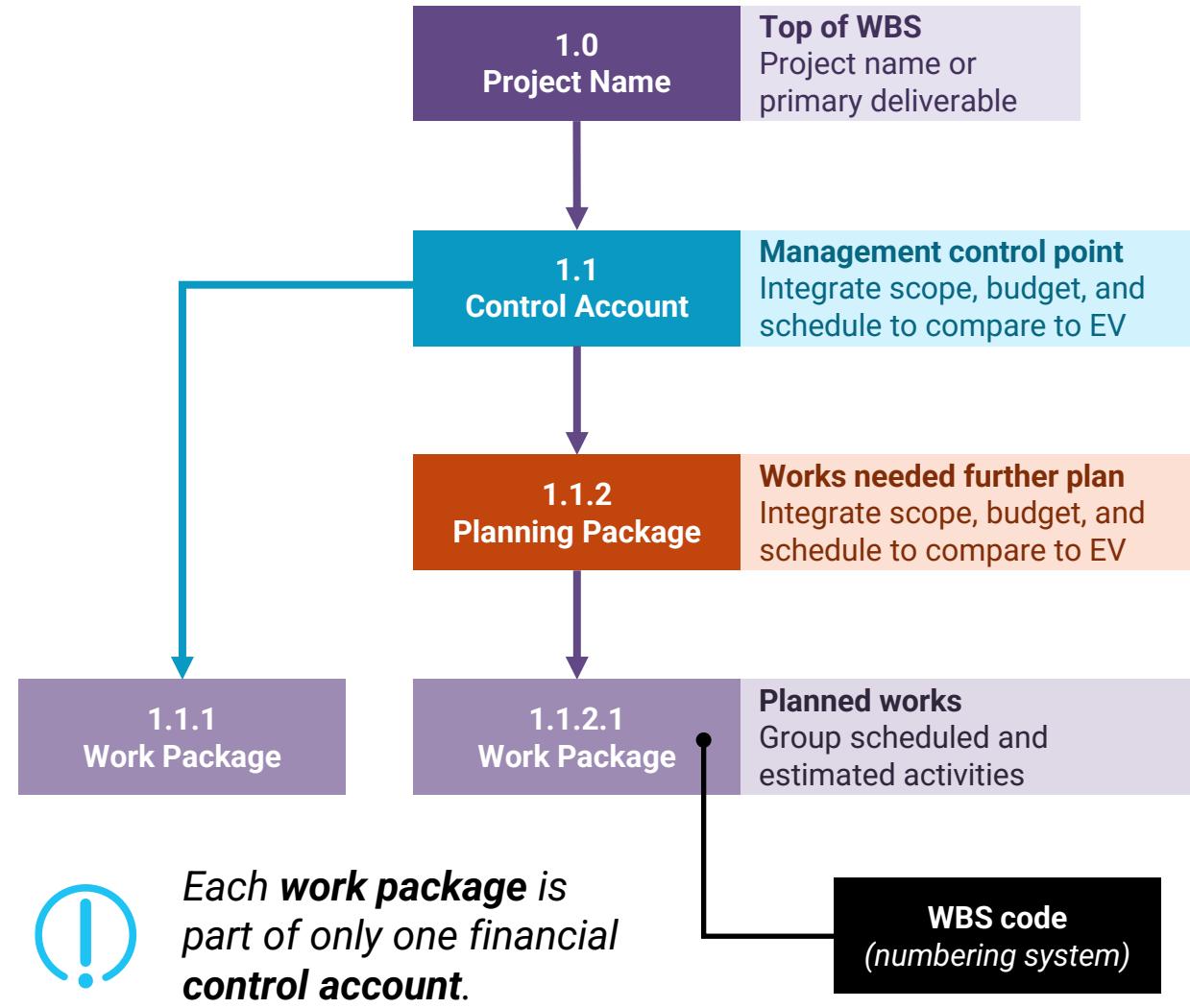
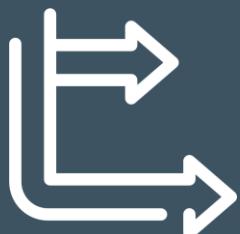
Optimizes value in a structured way

VALUE ANALYSIS

Examines factors affecting product/service cost in a systematic, interdisciplinary way towards success with the lowest cost and required quality and reliability standards

Create the Work Breakdown Structure (WBS)*

- Follow the 100% rule!
 - Include every aspect – nothing extra, nothing missing
- Include project and product components
- Use hierarchical structure
 - Highest – project
 - Next – deliverables
 - Lowest – work package



Decompose Work in the WBS

Divide and subdivide the project scope and deliverables into smaller, more manageable parts



Steps:

1. Identify deliverables and the work/tasks needed to accomplish them
2. Structure and organize the WBS
3. Decompose high-level WBS scope components into low-level components
4. Develop and assign a unique identification code to each component from the **code of accounts**
5. Review the decomposition of work packages and verify that they align with the project requirements

Tailor the level of decomposition to specific project needs and the level of granularity needed to manage the project effectively.

WBS Dictionary



Provides detailed deliverable, activity and scheduling information about each component in the WBS



Decompose work and include:

- WBS code identifier
- Description of work
- Assumptions and constraints
- Responsible organization
- Schedule **milestones**
- Associated schedule activities
- Resources required to complete the work
- Cost estimations
- Quality requirements
- **Acceptance criteria**
- Technical references
- Agreement information

Scope Baseline

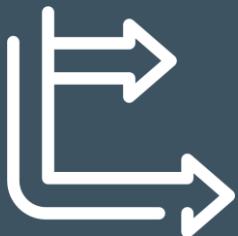


- Approved version of a scope statement, WBS and its associated WBS dictionary, that can be changed only using formal change control procedures
- Used as a basis for comparison to actual results

Components include:

- Project scope statement
- WBS
- Work packages
- Planning package
- WBS dictionary

Don't Forget to Plan for Transitions / Handovers!



Include activities to fulfill transition/implementation in the scope of work

- Consider all stakeholders, schedules, risks, budgets, and quality standards.
- Identify deliverables/outputs



These can be delivered throughout the project, not just at the end!

Questions to consider:

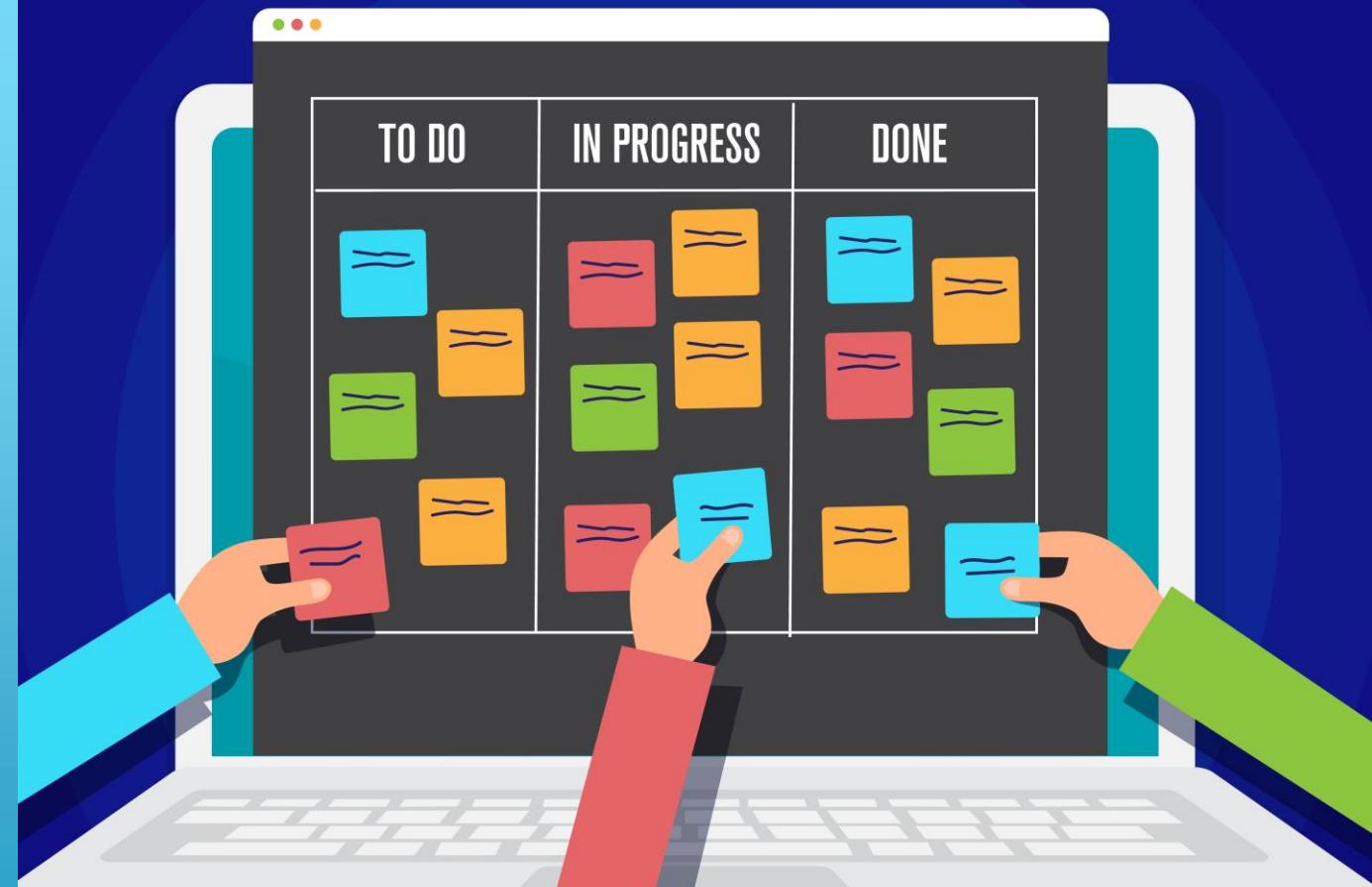
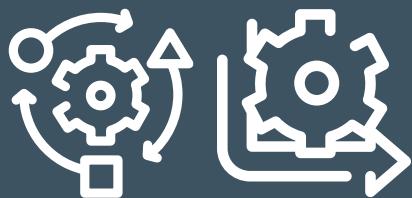
- Will the work be new, or an update in the business environment?
- How best to transition the product into a live environment?
- What about decommissioning or removing old systems, processes or materials?
- Did you ensure training and knowledge transfer are complete/satisfactory?



How do adaptive or hybrid teams “plan” for handovers or transitions?

Scope Planning in Adaptive Environments

- Incremental or iterative development
- User stories propose an alternative way of viewing the requirements process



Release and Iteration Planning



Planning also takes place at the standup meeting when teams discuss details of work in progress.



Collaborative planning meetings that break scope into larger releases and then iterations/sprints

At **release planning** (or Agile release planning), decide:

- Number of iterations or sprints needed to complete each release
- Features contained in the release
- Goal dates of each release

At **iteration planning** (or sprint planning):

- Review the highest prioritized user stories or key outcomes
- Ask questions
- Agree on effort required to complete the user story in the current iteration
- Determine the activities required to deliver iteration objectives

Backlogs

- Prioritized list of **the known scope of work**
- Information presented in **story form**
- Continually updated by the **product owner in collaboration with teams**



Example:

A **product owner** creates a **product backlog** and identifies and adds stories in collaboration with the team and stakeholders. Work items describe desired product functionality through user stories.

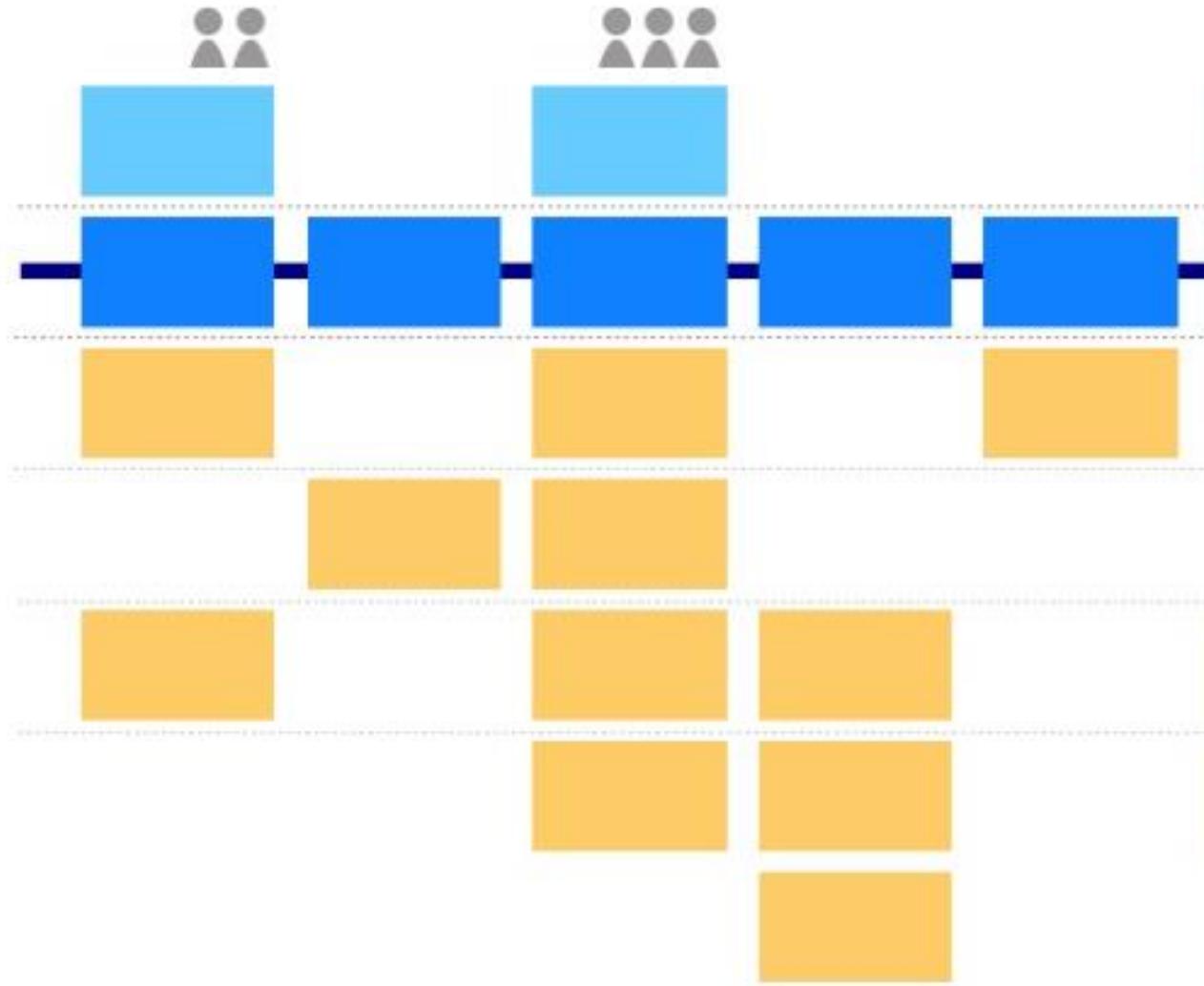
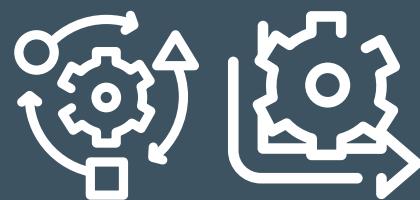
- The product owner is responsible for prioritizing work according to value.
- The product owner and team collaborate to move work items to the **iteration/sprint backlog**.



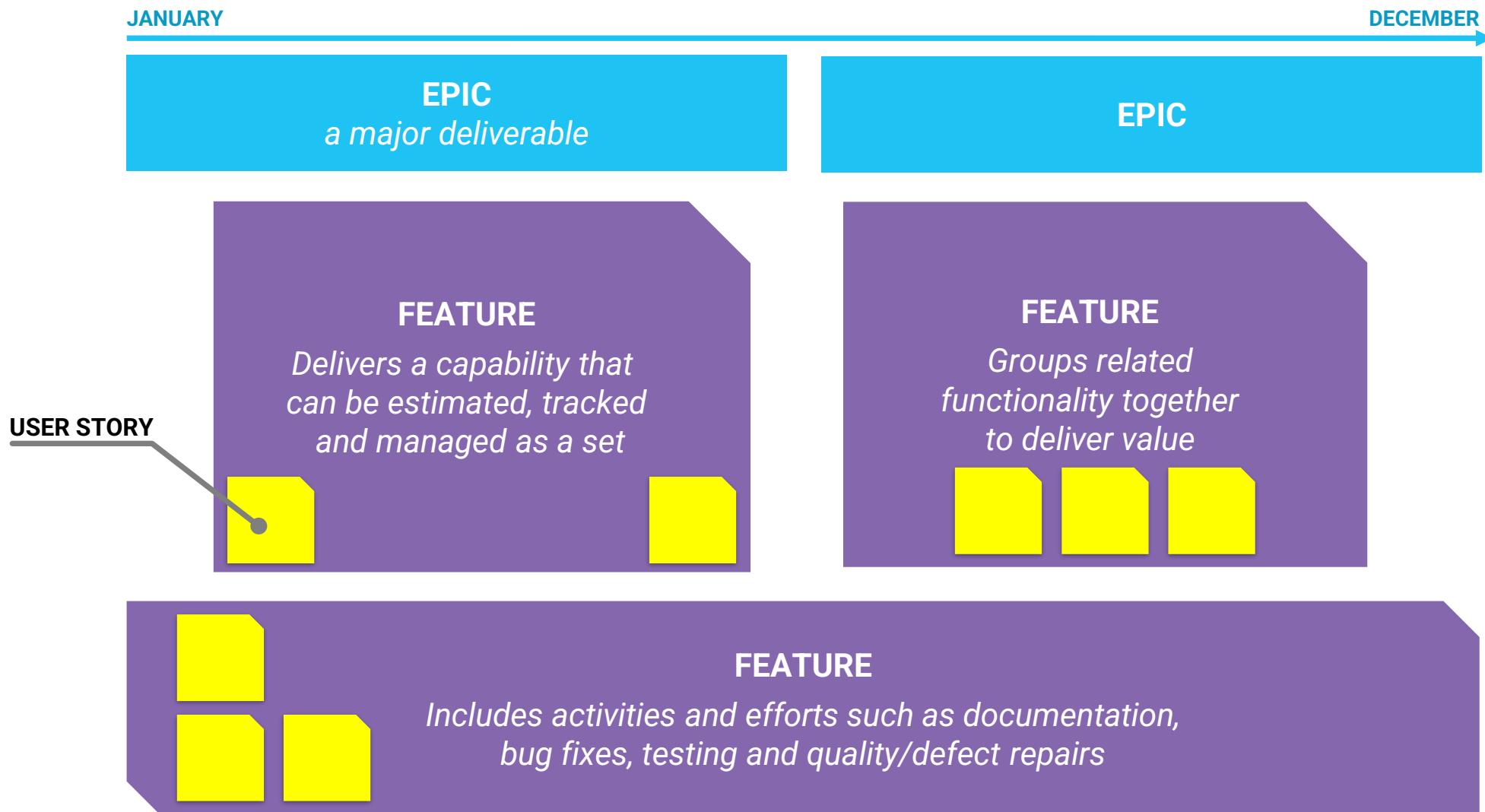
Backlogs may be known by slightly different names on your team or project, but the names are generally descriptive – e.g., requirements backlog, sprint backlog, lean backlog.

User Stories, Story Maps, Roadmaps

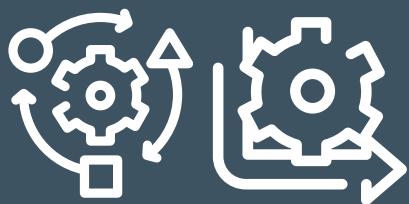
- A **story map** organizes **user stories** into functional groups and within a narrative flow (“the big picture”) of the **product roadmap**.
- Helpful for discovering, envisioning and prioritizing the product and a way ahead!
- *Story map technique developed by Jeff Patton*



Epics > Features > User Stories



Prioritize and Refine the Backlog



- Continual refinement done by product owner/customer prior to iteration planning
- Additional refinement can be done jointly by the team and product owner during the sprint/iteration
- Allows reorganization and reprioritization of work to complete higher-priority items that deliver value first
- Split epics into user stories

Plan Scope: Quiz



Which two stakeholders perform project scope planning? (Choose two)

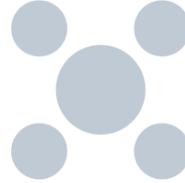
- a. Ang Fen, project manager
 - b. Helen Grey, product owner
 - c. Eugene Lowe, project sponsor
 - d. Project team
-

Ang Fen wants to give the executive team an overview of the work ahead at the next strategy meeting. Which artifact should he show them?

- a. Scope management plan
- b. Product roadmap
- c. Scope statement
- d. Work breakdown structure



ECO Coverage



2.1 Execute project with the urgency required to deliver business value

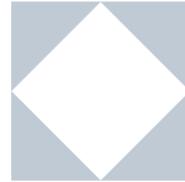
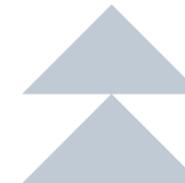
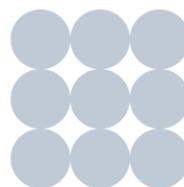
- Support the team to subdivide Project tasks as necessary to find the minimum viable product (2.1.3)

2.8 Plan and manage scope

- Predictive vs Adaptive approach for scope
- Determine and prioritize requirements (2.8.1)
- Break down scope (e.g., WBS, backlog) (2.8.2)

2.17 Plan and manage project/phase closure or transitions

- Determine criteria to successfully close the project or phase (2.17.1)



DAILY PMP BOOTCAMP SURVEY



LOOK FOR THE SURVEY LINK IN THE CHAT

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

For each Bootcamp session,

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

We sincerely value your opinion!

Survey Scale

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



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

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

KEY PERFORMANCE INDICATORS (KPIs)



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



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

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

PROJECT CHARTER



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 MANAGEMENT



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 MANAGEMENT PLANS



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

ADDITIONAL COMPONENTS



PROJECT MANAGEMENT PLAN COMPONENTS

ADDITIONAL COMPONENTS

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



PROJECT MANAGEMENT PLAN COMPONENTS

BASELINES

- Scope baseline
- Schedule baseline
- Cost baseline

PROJECT DOCUMENTS



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

The features, functions, and works that characterize the delivery of a product, service, and/or result.

PRODUCT SCOPE



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



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



PRODUCT ROADMAP

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

MILESTONE



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 REQUIREMENTS PROCESS



COLLECT REQUIREMENTS PROCESS

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

REQUIREMENTS DOCUMENTATION



REQUIREMENTS DOCUMENTATION

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

USER STORY



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.

NOMINAL GROUP TECHNIQUE



NOMINAL GROUP TECHNIQUE

A technique that enhances brainstorming with a voting process used to rank the most useful ideas for further brainstorming or for prioritization.

MULTI-CRITERIA DECISION ANALYSIS



MULTI-CRITERIA DECISION ANALYSIS

A technique that utilizes a decision matrix to provide a systematic, analytical approach for establishing criteria, such as risk levels, uncertainty, and valuation, to evaluate and rank many ideas.

BENCHMARKING



BENCHMARKING

The comparison of actual or planned products, processes, and practices to those of comparable organizations to identify best practices, generate ideas for improvement, and provide a basis for measuring performance.

CONTEXT DIAGRAM



CONTEXT DIAGRAM

Visual depiction of product scope, showing a business system (process, equipment, computer system, etc.) and how people and other systems interact with it.

STORYBOARDING



STORYBOARDING

The prototyping method that uses visuals or images to illustrate a process or represent a project outcome. Storyboards are useful to illustrate how a product, service, or application will function or operate when it is complete.

PROTOTYPES



PROTOTYPES

A method of obtaining early feedback on user requirements by building a working model of the expected product. Prototypes can be used to solicit aesthetics, functionalities etc. Several iterations maybe displayed.

SCOPE MANAGEMENT PLAN



SCOPE MANAGEMENT PLAN

A component of the project or program management plan that describes how the scope will be defined, developed, monitored, controlled, and validated.

WORK BREAKDOWN STRUCTURE (WBS)



WORK BREAKDOWN STRUCTURE (WBS)

A hierarchical decomposition of the total scope of work to be carried out by the project team to accomplish the project objectives and create the required deliverables.



EPIC

A large body of work that can be broken down into smaller pieces—features and user stories. Epics can take months to complete.

FEATURE



FEATURE

A set of related requirements that allows the user to satisfy a business objective or need.