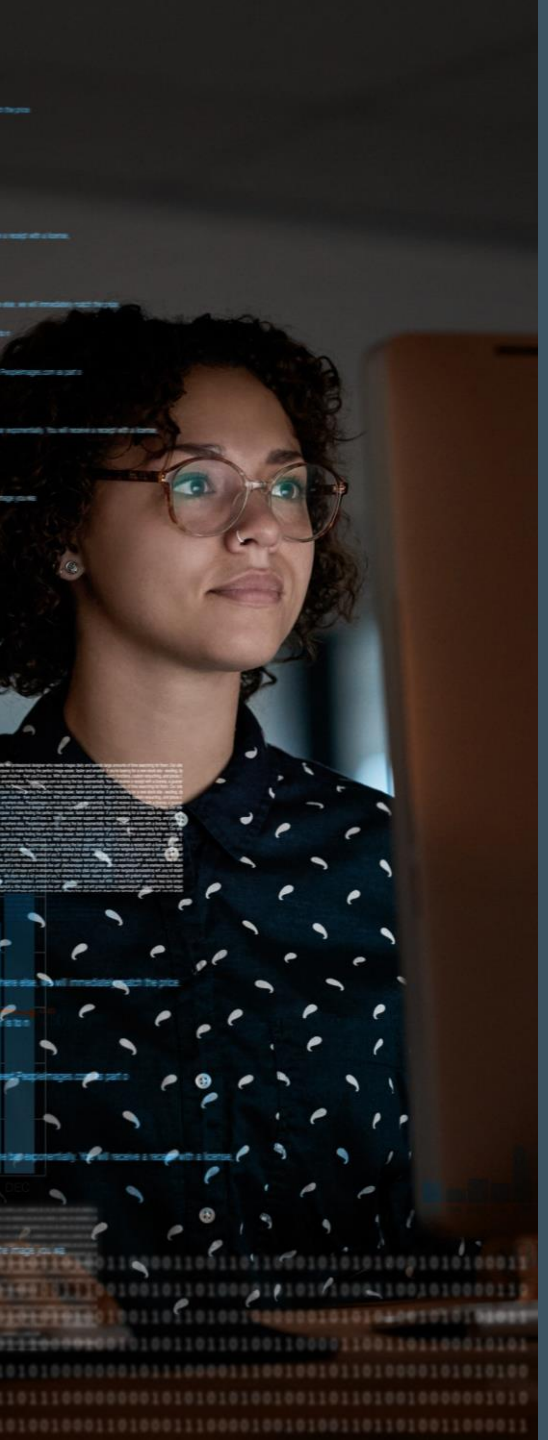


PMP® EXAM PREP
PMI Authorized Training Partner
BOOTCAMP
Session 7

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.

House Keeping

- If you haven't attended the first or second session, please do the following.
- Please use the Q&A **only** to get help with technical issues, to locate your resources or recordings for the sessions, to ask about attendance requirements and how to get the PMP Learner Kit, to ask questions about the content, or for any other questions. As the session comes to an end the survey link can be provided in the Q&A.
- Use the chat before the session starts for salutations. Once the session begins the chat may be closed throughout the session to minimize disruptions and to provide important information. The chat will be opened periodically to respond to the instructor's questions. As the session comes to an end the survey link can be provided in the chat. The chat may be opened to allow for goodbyes.

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.**
- A **missed session means** you are logged out of a session for **more than 15mins**.
- 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*.

- *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.

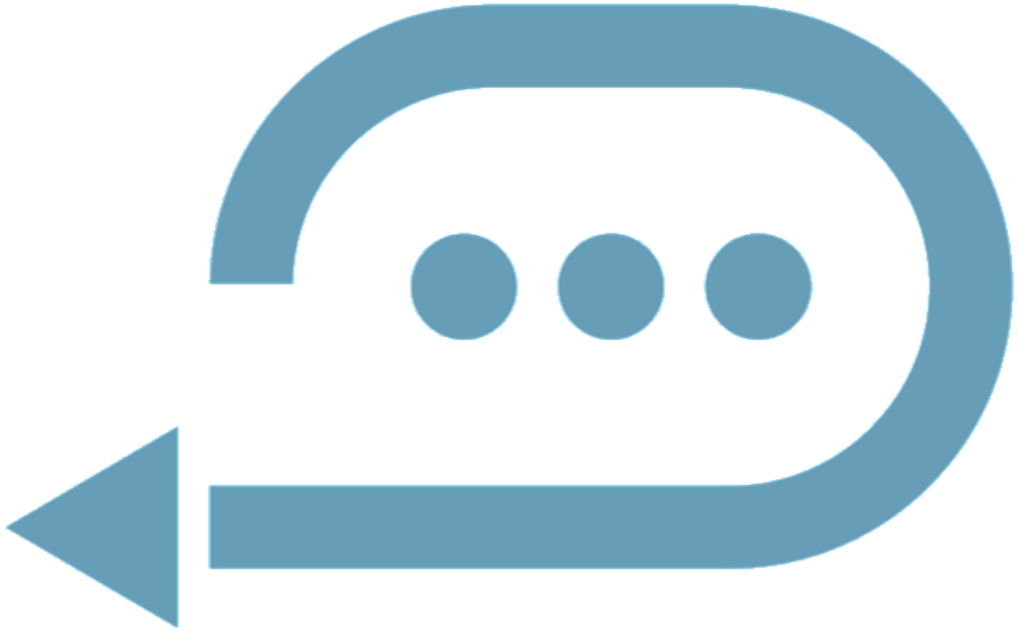
Note: The password to open the Excel file is NOT the passcode to access the replay.

***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 6



Mapping this course to the Student Workbook

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

LESSON 4

LEAD THE PROJECT TEAM

- Craft Your Leadership Skills
- Create a Collaborative Project Team Environment
- Empower the Team
- Support Team Member Performance
- Communicate and Collaborate with Stakeholders
- Training, Coaching and Mentoring
- Manage Conflict

Version 3.2 | 2023 Release

Learning Objectives

- Discuss the guidelines for developing leadership competencies and skills.
  - Address leadership styles, and the components of leading a successful team, either in person or virtually.
- Describe artifacts and the strategies for their use.
- Identify the characteristics and core functions of empowered teams.
- Explain strategies and forms of communication for collaborating in a project team environment.
- **Learn the value of training, coaching and mentoring for a team.**
- **Explain the importance of conflict management.**
- **Discuss the causes and levels of conflict and their outcomes.**

Communicate and Collaborate with Stakeholders

TOPIC E

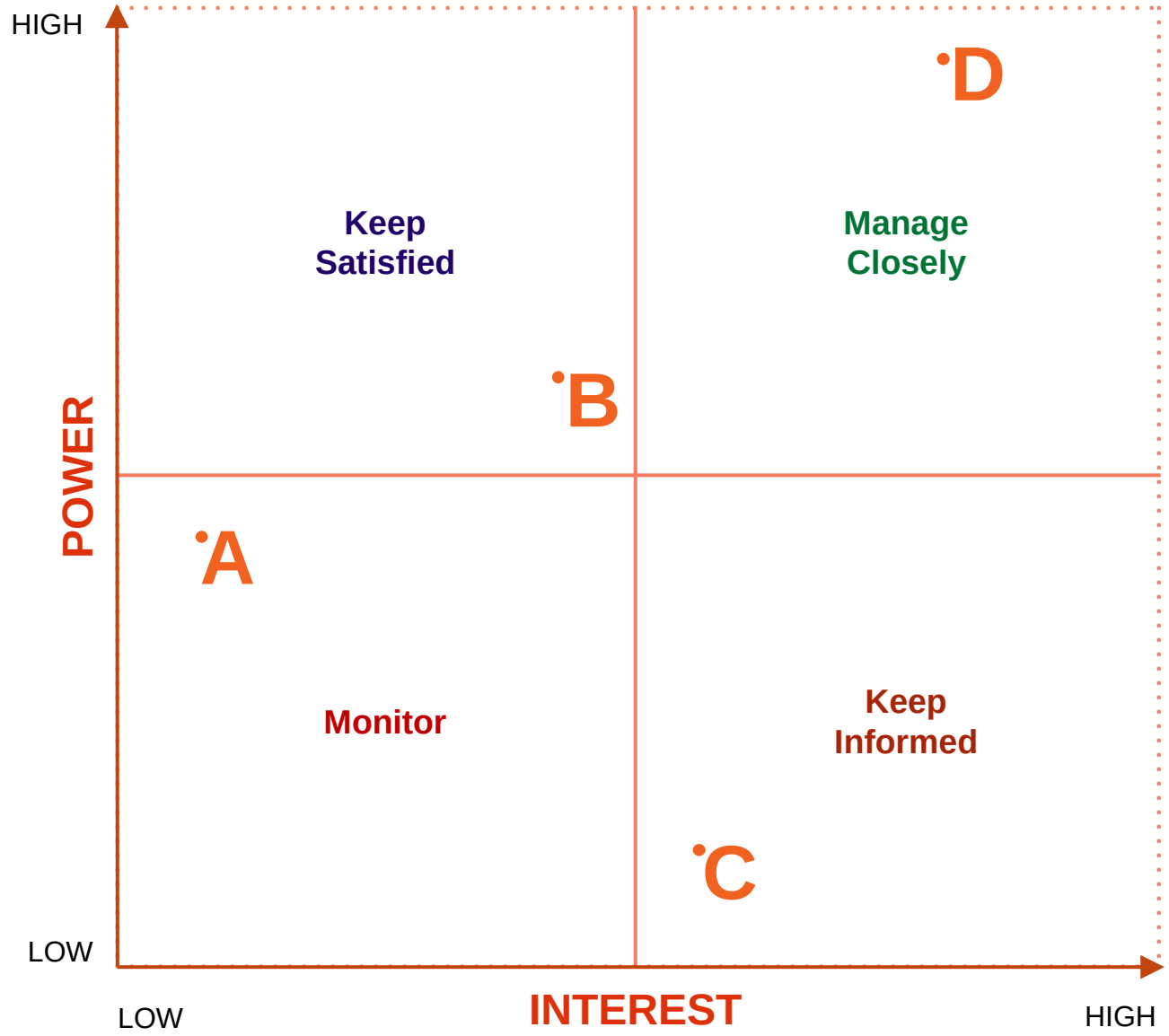
“Communication is the real work of leadership.”

- Nitin Nohria
Dean of the Harvard Business School, 2010-2020

Monitor Stakeholders and Their Engagement

- Update grids at key intervals
- Use analysis and expert judgment
- Keep a record of the reasons for placement to enable needed change or improvement
- Tailor management strategies and actions to individuals, in addition to their place in the grid

Never use names on power/influence or power/interest grids.



Communications Management Plan

- Identifies team members and stakeholders as:
  - Senders
  - Receivers
  - Authorizing person (confidential information)
- Lists stakeholders' communication requirements, including:
  - Type of information
  - Reason for communication
  - Language, format, content and level of detail
  - Time frame and frequency
  - Whether receipt/ acknowledgment or response is required

- Processes/guidance/templates for:
  - Escalation
  - Updating/refining the plan
  - Running project status meetings, project team meetings, sending emails, using website and PMIS
- Project information:
  - Communications methods/technologies to use
  - Allocated resources (time and budget)
  - Glossary
  - Flow charts, workflows, list of reports, meeting plans
  - Constraints

Managing Project Communications: Communications Matrix

Abbreviation of communications management plan that includes:

- Identified team members and stakeholders as:
  - Senders
  - Receivers
  - Authorizing person (confidential information)
- Stakeholder communication requirements:
  - Type of information
  - Reason for communication
  - Language, format, content and level of detail
  - Time frame and frequency
  - Whether receipt/ acknowledgment or response is required
- Processes/guidance/templates for **escalation**
- Project information - **Communications methods/technologies** to use

Communication:
Two Ways

Active Listening

- Enables collaboration
- Requires listener to provide feedback about what they heard by:
  - Re-stating
  - Paraphrasing
  - Using body language such as nodding the head
- Confirms understanding and builds trust

Effective feedback is:

- Clear, specific and offered in a timely manner
- Objective and critical
- Positive if received and understood as objective
- Negative if misunderstood or there is a lack of trust and psychological safety.

- *Consider lack of feedback as an implicit acceptance of the message by the receiver.*
- *Communication failures are threats to projects, so discuss communications issues openly with team members directly, during team retrospectives. In the case of key stakeholders, you might need to escalate as appropriate.*

Reports and Formal Communication

Can you think of some examples?

Formal reporting at appropriate milestones is a proven way of maintaining continuous communication with stakeholders.

It's also needed to obtain "sign-off" or approval on work.

Recipients of reports and the desired frequency are noted on the **stakeholder engagement plan** and the **communications management plan.**

How to Collaborate

- Optimize understanding of aims and expectations through open dialogue and meaningful communication
- Engage continuously
- Accept that engagement levels may fluctuate
- Keep discussions transparent
- Ensure stakeholders are knowledgeable and expectations are set
- Leverage communication and interpersonal skills, feedback and meeting management
- Maximize the feedback loop – gain meaningful insights
- Use effective tools – e.g., shared whiteboards

Use Information Radiators

Keep Information Visible

- Kanban boards
- White boards
- Wikis
- Fishbowl windows

Information radiators enable open communication and collaboration.

They can be electronic or physical, or both.

Secondary benefit is innovation — to provoke conversation and collaboration when stakeholders visit the workspace

Main benefit is accountability — promoting responsibility among team members

Collaboration Activities

- Daily stand-up meetings
- Colocated or face-to-face working
- Scheduled sessions — e.g., milestone reviews, backlog refinement sessions, project update meetings
- Pairing or coaching, as in knowledge transfer
- Negotiations

Communicate and Collaborate to Negotiate

- Think of **negotiations as conversations** with internal and external parties toward reaching agreements.
- Use **effective communication methods** to ensure collaboration with the other party is aimed at reaching consensus.
- Keep negotiations **positive** to increase the likelihood of success.

Meetings

Everyone’s time is **valuable.** Run and participate in meetings **efficiently**.

- Be **organized**! Provide a clear agenda with purpose and desired outcomes
- **Timebox** discussions
- Practice **active listening** and **feedback**
- Facilitate **collaboration**

Stakeholder Engagement Assessment Matrix (SEAM)

- Use **expert judgment**, **emotional intelligence**, and **interpersonal skills** to assess stakeholders

- Update the SEAM regularly and often

Engage stakeholders by category to coach them and find solutions!

ECO Coverage

2.2 Manage communications

- Communicate project information and updates effectively (2.2.3)
- Confirm communication is understood and feedback is received (2.2.4)

1.2 Lead a team

- Analyze team members' and stakeholders' influence (1.2.6)

2.4 Engage stakeholders

- Engage stakeholders by category (2.4.3)

1.9 Collaborate with stakeholders

- Optimize alignment between stakeholder needs, expectations, and project objectives (1.9.2)
- Build trust and influence to accomplish project objectives (1.9.3)

3.2 Evaluate and deliver project benefits and value

- Appraise stakeholders of value gained by the project (3.2.5)

Training, Coaching and Mentoring

TOPIC F

Foster a Knowledge-Sharing Culture

Training, coaching, and mentoring are all forms of knowledge-sharing that advance projects and organizations.

- Team members learn from **and** teach others
- It's **for everyone**, including stakeholders, team members, and customers as part of project work and **continuous improvement** efforts
- Some **project roles** are dedicated to knowledge-sharing — e.g., **agile coaches** or scrum masters
- It's essential in **product delivery** and **transition planning**!

Training, Coaching and Mentoring

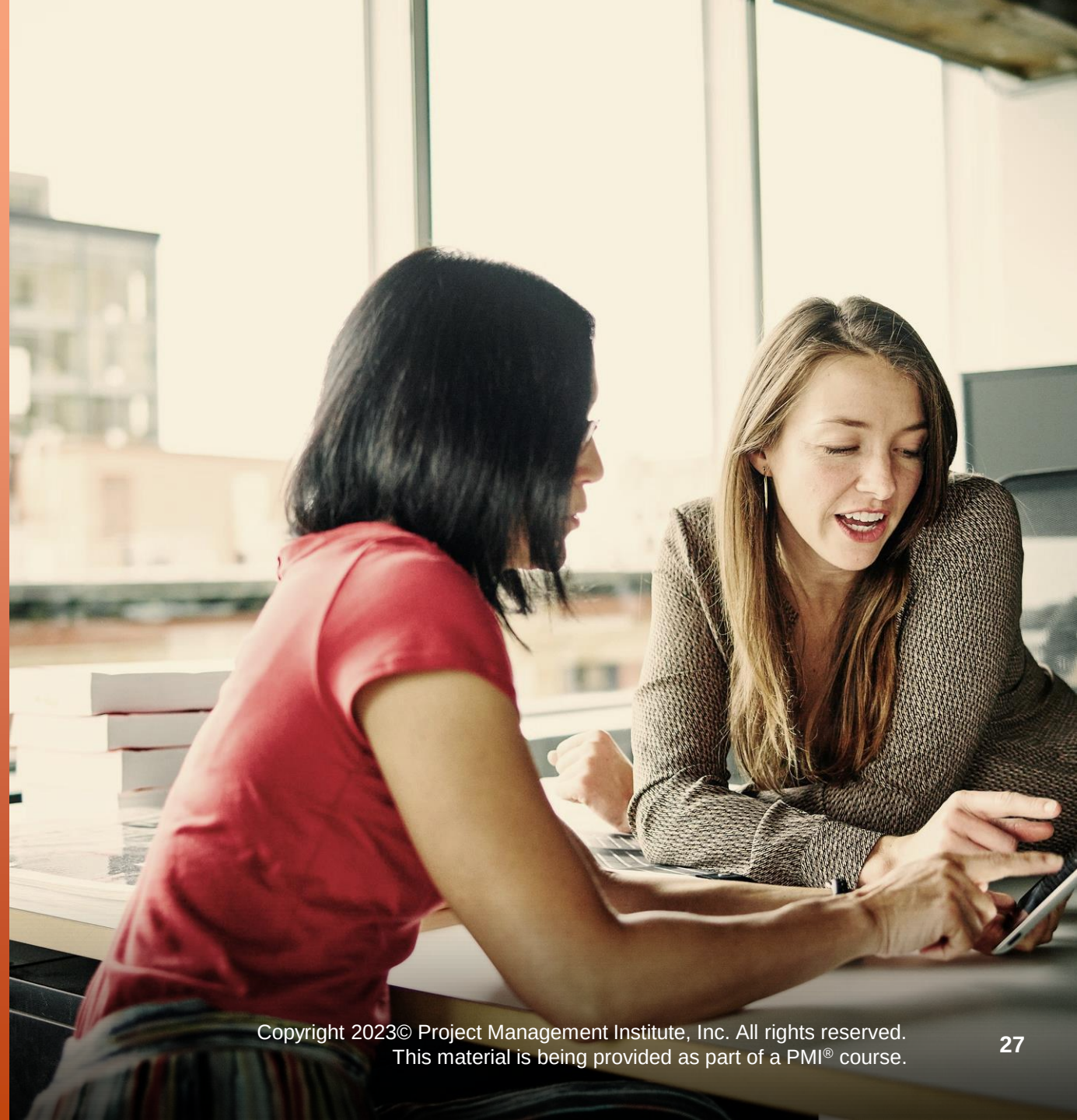
Descriptions

Training	Learn skills for use in the present	• Individually or as a group • aka “upskilling” • On any topic
Coaching	Learn how to apply new skills or improve existing ones	• Individually or as a group • Puts learning into practice
Mentoring	Development of personal and professional growth through long-term professional relationships.	• Between a novice and a more experienced person • Internal or external to projects or organizations

How to Acquire Required Competencies

- Discover current skill sets and competencies
- Identify what's desired
- Take action!
  - Meet unique needs — e.g., topics, depth, schedule, format
  - Coach on the customer's business, culture, desired outcomes, and project context
  - Encourage mentorships

Use and update the SEAM to facilitate easier collaboration.



Plan for Training, Coaching and Mentoring

- Perform a **gap analysis** to identify required knowledge, skills, or attributes.
- Plan for a suitable **diversity of training and coaching offerings**.
  - Soft skills
  - Technical skills
  - Part of team-building or fun/informal activity
- **Schedule training** close to the time of solution implementation
- Consider **upskilling or certification** for team members
- Encourage valued stakeholders to become mentors

Know the Value of Training, Coaching and Mentoring

Treat knowledge as an asset!

- Conduct a **cost-benefit analysis** to determine the potential value in cost savings — e.g., replacing outsourced labor
- Help others or yourself to **improve skills and knowledge**
- Increase the team's ability to **increase quality**, **output**, and **value**
- **Build relationships and trust** with stakeholders and team members

Training, Coaching and Mentoring Discussion

Have you ever had a valuable trainer, coach or mentor?

- *Describe why they were effective.*

Would people think YOU are a valuable trainer, coach or mentor? Why?

Elements of Training

- Provided to teams, small groups or individuals
- Covers management, technical or administrative topics
- Delivery models:
  - Instructor-led classroom
  - Virtual classroom
  - Self-paced eLearning
  - Document reviews
  - Interactive simulations
  - On-the-job training

Coach Teams and Individuals in Project Management

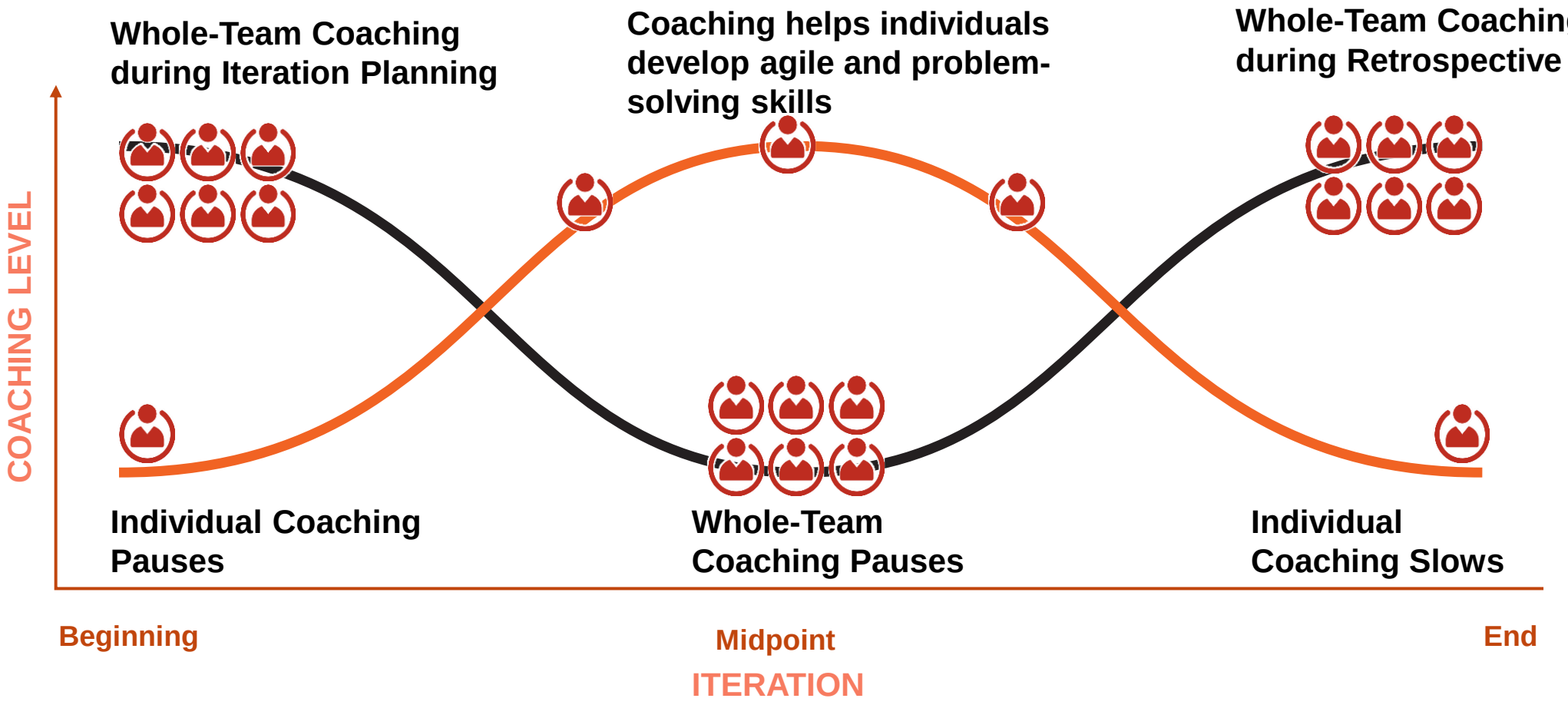
Acknowledge informal opportunities that may already be happening:

- Delegate tasks, observe and provide feedback
- Encourage others to take the lead on activities
- Collaborate on a project management task

Introduce formal opportunities:

- Facilitate meetings and sessions
- Transfer skills by pairing individuals
- Model behaviors

Coach Groups and Individuals



Self-Organizing Teams Collaborate and Learn

- Encourage **self-organization** and **initiative** in daily work life
- Coach individuals on **how to contribute** to other project roles
- Coach an individual with **tacit knowledge**
- Use **servant leadership**
- Use **job shadowing**, **coaching** or **mentoring** during transitions to transfer knowledge and skills from project team to organization

Measure Training Outcomes

Measurement of training includes noting improvements with:

- Post-training performance assessments
- Observation of knowledge or skill improvement
- Certifications – badges, letter from awarding body
- Discuss and share training outcomes in team retrospectives

Augment training through coaching to **convert learning into active use of knowledge**. Try pairing team members in knowledge-sharing relationships.

If desired outcomes are not achieved, record this in the lessons learned and try to find out why.

Maintain Mentorships

- Longer-term partnerships that enable professional growth
- Job-shadowing engagements enable transfer of explicit and tacit knowledge
- Tailor to context and desired engagement — e.g., some organizations use mentorships to train project managers and may use reporting to guide development, while others use an informal approach

ECO Coverage

1.6 Build a team

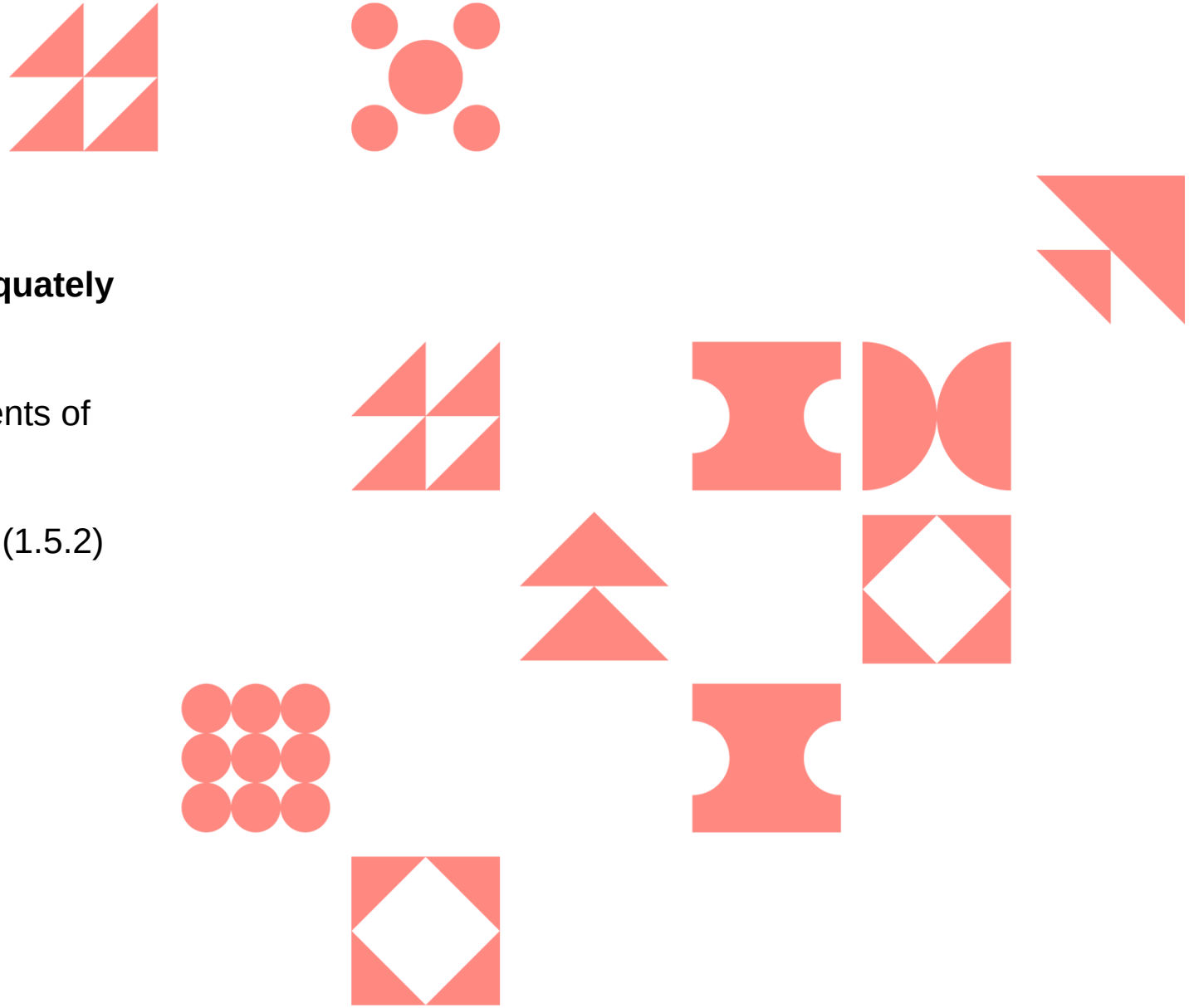
- Appraise stakeholder skills (1.6.1)

1.5 Ensure team members/stakeholders are adequately trained

- Determine required competencies and elements of training (1.5.1)
- Determine training options on training needs (1.5.2)
- Allocate resources for training (1.5.3)
- Measure training outcomes (1.5.4)

1.13 Mentor relevant stakeholders

- Allocate the time for coaching mentoring (stakeholders) (1.13.1)
- Recognize and act on coaching mentoring opportunities (1.13.2)



Manage Conflict

TOPIC G

Why Conflict Management Matters

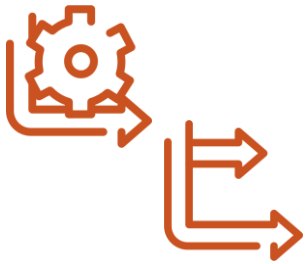
Ineffective conflict management leads to:

- Destructive behavior
- Animosity
- Poor performance
- Reduced productivity

Effective conflict management leads to:

- Improved understanding
- Better performance
- Higher productivity

Conflict Management
Roles



All team members and stakeholders are responsible for managing conflict

Project managers **influence the direction and handling of conflict** through **interpersonal skills** and **servant leadership**

The team is empowered to resolve conflicts; the team lead can facilitate resolution.

Causes of Conflict

Context

- Competition
- Differences in objectives, values, and perceptions — this can be ideological
- Disagreements about role requirements, work activities and individual approaches
- Communication breakdowns
- Projects are unique and team members not worked together before

Conflict as Part of Team Culture

In a **psychologically safe** work environment:

- View disruption and innovation as connected
- Encourage exchanges and disagreement
- Prevent escalation to conflict

How to Handle Conflict

Use preferred ways of managing conflict from the **team charter** and **ground rules**. Provide guidance and resources to help the team.

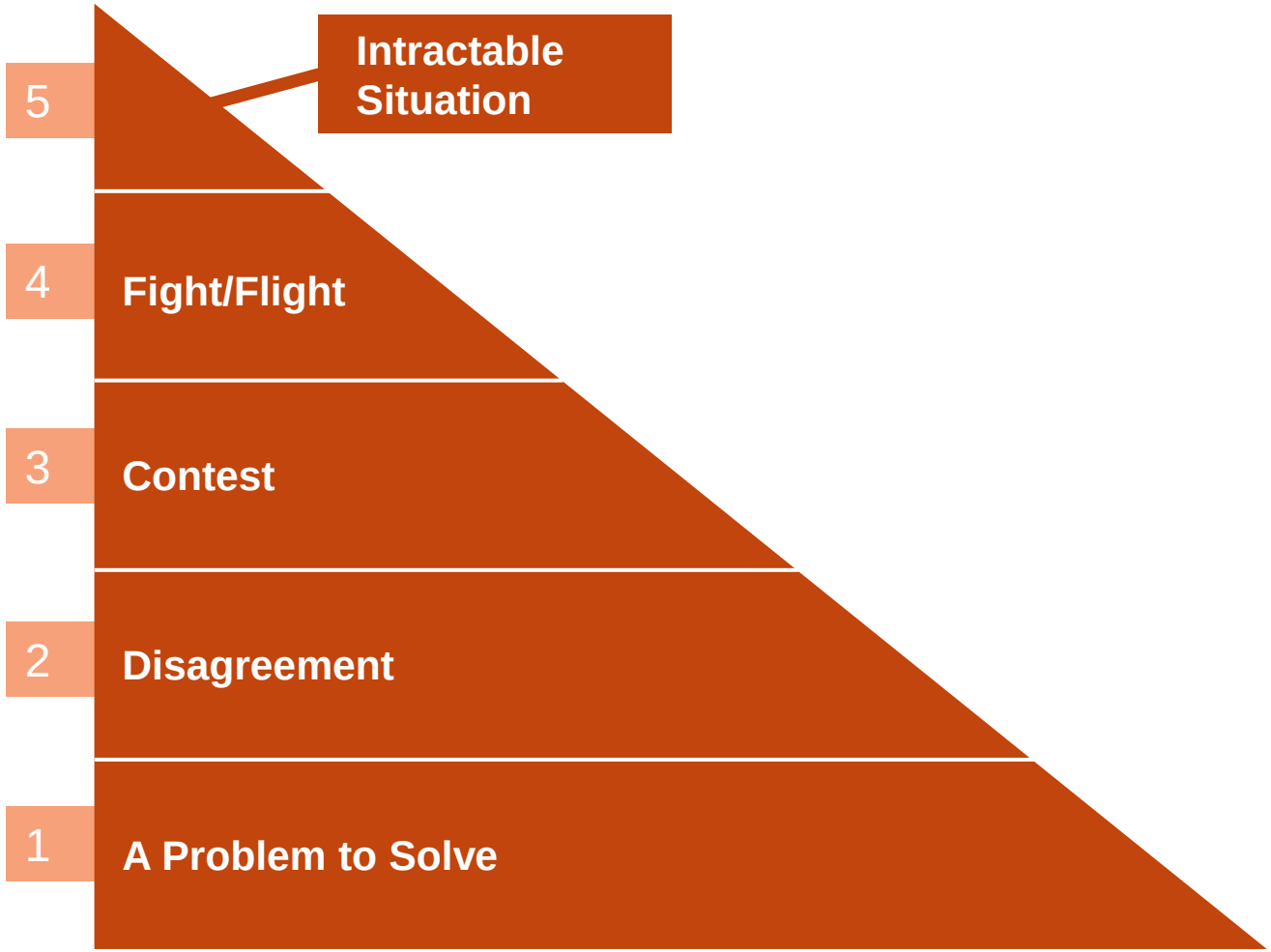
Agile teams include conflict management strategies in their way of working (WoW) and are supported by a culture of trust.

Focus on the issues and not on individuals.

Use Leas' Levels of Conflict

Conflict intensifies from level 1 to 5

From task-orientated with possible resolution to a personal or relationship orientation, where **the focus on issues is lost**.



Conflict Model by Speed B. Leas (2012)

Use Interpersonal Skills to Manage Conflict

Emotional Intelligence	Use empathy to understand and diffuse situations
Influencing	Persuade parties to reconsider or change their tone, approach, or mindset
Leadership	Steer others in a more positive direction
Decision-Making	Offer a solution to move the situation forward
Active Listening	Listen for personalized, accusing language and bitter or caustic tone, defensive or aggressive physical postures

Conflict Management Approaches

Smooth/ Accommodate	• Emphasize areas of agreement • Concede position to maintain harmony and relationships
Withdraw/ Avoid	• Retreat from the situation • Postpone the issue
Compromise/ Reconcile	• Incorporate multiple viewpoints • Enable cooperative attitudes/open dialogue to reach consensus and commitment
Force/Direct	• Pursue your viewpoint at the expense of others • Offer only win/lose solutions
Collaborate/ Problem Solve	• Incorporate several viewpoints and insights from varying perspectives • Requires cooperative attitude and open dialogue • Search for solutions that typically lead to consensus and commitment

*Root cause analysis – **5 Whys Method***

ECO Coverage

1.1 Manage conflict

- Interpret the source and stage of the conflict (1.1.1)
- Analyze the context for the conflict (1.1.2)
- Evaluate/recommend/reconcile the appropriate conflict resolution solution (1.1.3)

1.12 Define team ground rules

- Discuss and rectify ground rule violations (1.12.3)

1.10 Build shared understanding

- Investigate potential misunderstandings (1.10.4)
- Break down situations to identify the root cause of a misunderstanding (1.10.1)

End of Lesson 4

LESSON 5

SUPPORT PROJECT TEAM PERFORMANCE

- Implement Ongoing Improvements
- Support Performance
- Evaluate Project Progress
- Manage Issues and Impediments
- Manage Changes

Version 3.2 | 2023 Release

Learning Objectives

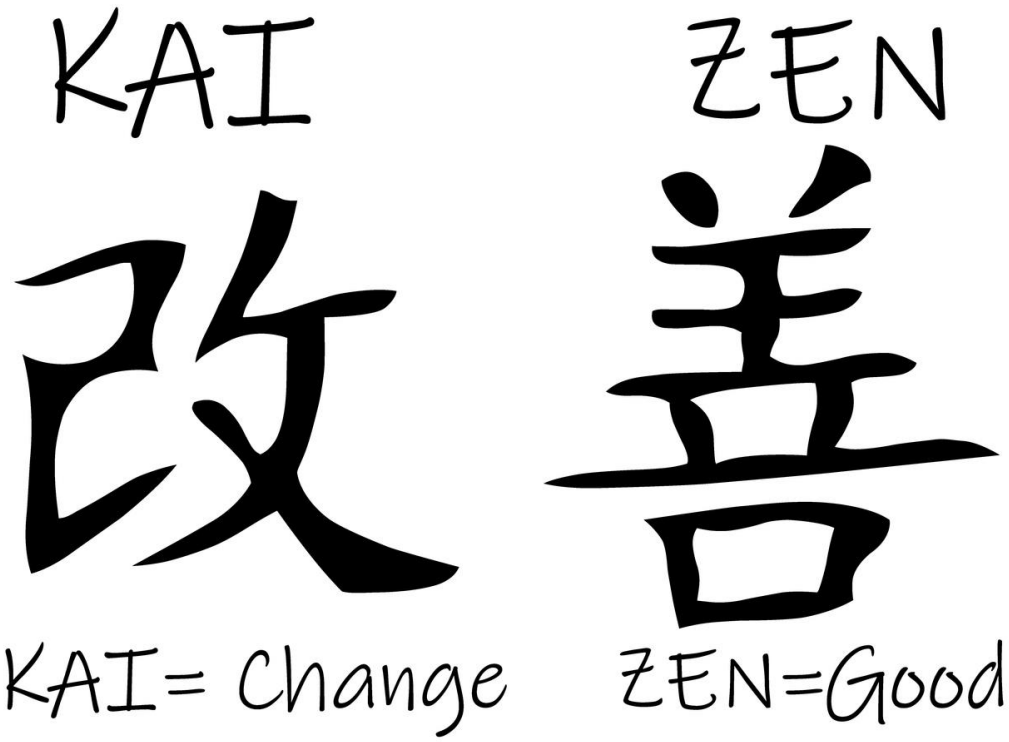
- **Explain the various methods for implementing improvement.**
- **Explain the various methods for performance measurement.**
- **Compare these methods with a focus on communication and accountability.**
- Identify the methods for implementing a project and the issues and impediments that arise during a project.
- Describe the methods for implementing changes during a project.

Implement Ongoing Improvements

TOPIC A

Continuous Improvement (CI)

- An ongoing effort to improve products, services or processes through small, incremental improvements or large breakthroughs
- A business strategy developed at the organizational level for projects to adopt and use
- Typically implemented by an organization’s PMO and/or a “structured learning” approach or CI framework such as Agile or Six Sigma



Kaizen

Assess Current CI Methods

How well are the team and organization equipped for CI?

- Is the **lessons learned register** up to date? Is the team having regular **retrospectives**? Are team members **Lean Six Sigma** or certified in an **agile** method**?**
- Do they know about **Kaizen, Lean**, **Crystal Methods** or **Capability Maturity Model Integration (CMMI)**?
- Also check the **process improvement plan** and the **project management plan!**

Use the risk register to assess current CI measures. It includes how the team is prepared to act to address threats to project quality, so it can be a helpful way of assessing current CI measures.

Conduct Retrospectives

Review and Improve Methods

- Prepare topics for inspiration
- On a board, make two columns
- Ask attendees to add items to these lists
- Allow each participant to identify the reason for the improvement
- Decide common items that need improvement and mark them
- Narrow the list to improvement areas that will bring value in the next sprint
- Get team consensus on the plan improvement
- Update these tasks on the backlog after a discussion with the product owner
- Implement changes

Went Well	Need to Improve
• On-time completion	• Retrospective method • Keep workspace tidy

Improve Your Improvement Methods

In addition to using the **lessons learned register** and **retrospectives** properly, try:

Experiments

- Use **A/B testing** and team **feedback** to identify improvements
- **Experiments** provide a way to improve team efficiency and effectiveness
- Apply controls — do them one at a time — to isolate the results

Pareto chart, or the **80/20 rule**

- Directs efforts where they can make the biggest impact
- Takes a big problem and breaks it down into smaller pieces

Update Processes and Standards

Use what you learned from successful experimentation to fashion and recommend CI steps

Can lessons learned at the project level apply to the organization's continuous improvement process?

If so, escalate these lessons as an opportunity for adoption at the organizational level

Interactive/Discussion

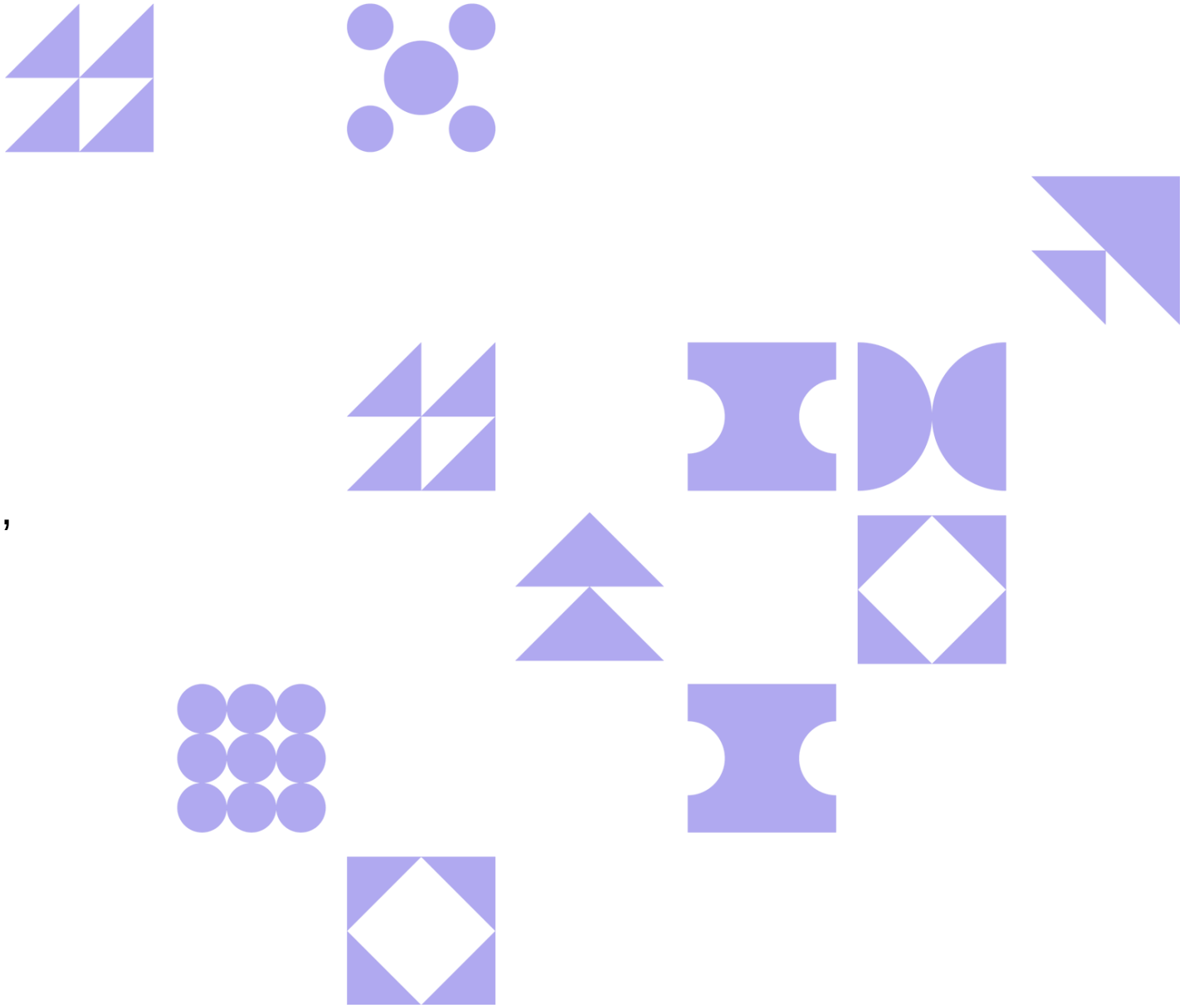
What are improvement procedures in your organization?

What methods do you use?

Lead With an Improvement Mindset

- Educate yourself
- Encourage a “fail fast” mindset
- Identify material improvements, training, processes or equipment
- Measure the effect of any change
- Then repeat!

Topics Covered



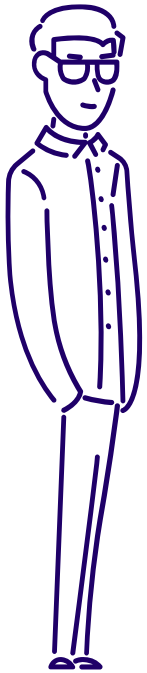
Continuous Improvement

- Plan continuous improvement methods, procedures and tools
- Assess CI framework
- Plan CI methods, procedures, tools
- Recommend/Execute CI steps

Support Performance

TOPIC B

Project Team Leadership Objectives



Communicate (and re-communicate) the project's objectives

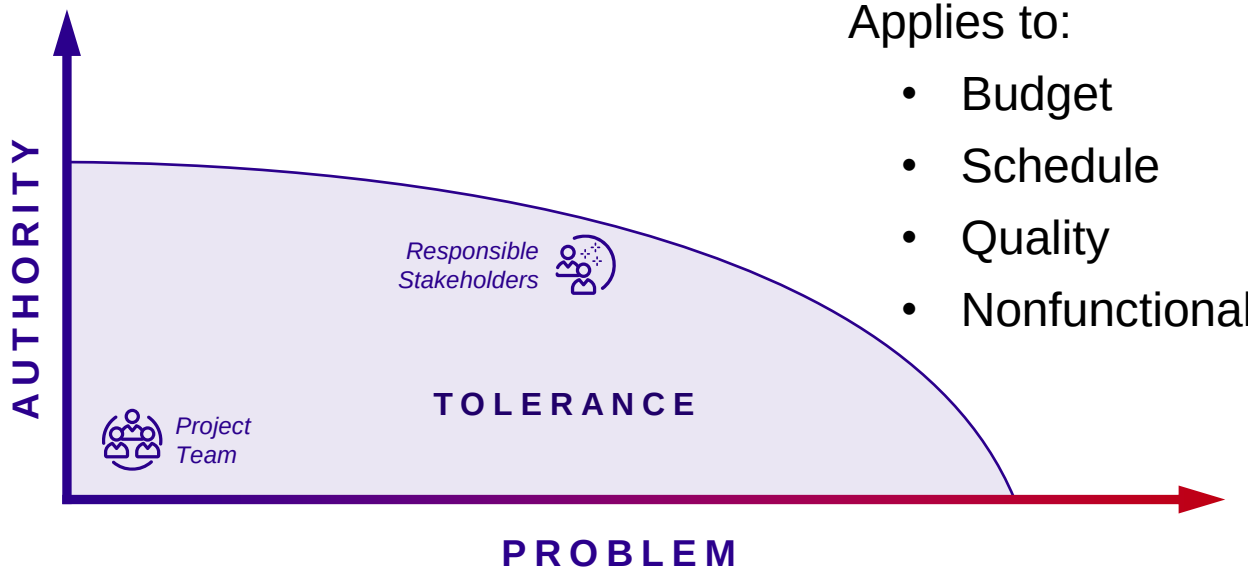
Ensure fluid knowledge-sharing, a continued healthy dynamic on the team, welcome new team members, realign the team.

Focus the team on delivering value

Manage with Objectives, Tolerances, Thresholds

Use clear and effective communication with clear **objectives** throughout the life cycle for a more productive and driven team.

Know the **thresholds** and **tolerance** levels that enable you to effectively manage a variation without needing to escalate.



Applies to:

- Budget
- Schedule
- Quality
- Nonfunctional requirements

The Project Manager's Role

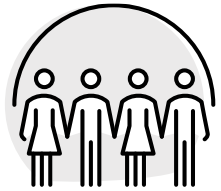
Centralized Model

- Ensures alignment of due dates — project deliverables, project life cycle and benefits realization plan
- Provides a project management plan
- Ensures creation and use of appropriate knowledge to/from the project
- Manages project performance and changes to project activities
- Makes integrated decisions about key changes that impact the project
- Measures and monitors progress, and takes appropriate action
- Collects, analyzes and communicates project information to relevant stakeholders
- Ensures completion of all project work and formally closes each phase, contract and the project as a whole
- Manages phase transitions when necessary

These tasks cannot be delegated.

Team Roles and Responsibilities to Support Performance
Review Exercise

PROJECT MANAGER



SCRUM MASTER / AGILE COACH

PRODUCT OWNER

In this hybrid project, the **project manager** oversees project management plan integration, but delegates control of detailed product planning and delivery to the **product owner**.

The **project manager** focuses on building a cross-functional team, a collaborative decision-making environment and ensuring the team can respond to changes.

The process role of **scrum master/agile coach** helps the team to understand the agile mindset and use scrum processes. To develop the SLC product, the **team** is the local domain expert that plans how to do the work and the **product owner** looks after value creation.

Optimize Communication

- Use **retrospectives** purposefully — discuss how to improve ways of working
- Communicate in both group and face-to-face settings — especially important for remote or virtual teams
- Make communication positive and regular with **internal** and **external** team members and stakeholders
- Use technology and tools; get **feedback** about them and tailor for optimization

Where did the team record expectations about communication?

*In the **team charter**!*

Use Feedback to Support High Performance

- Feedback is crucial for any team, using any method, in any environment
- Communicate in detail about technical and “soft” performance aspects
- Use appropriate methods — e.g., public or private, individual or group, written or verbal
- Give feedback in a timely manner
- Request feedback regularly, as and when needed

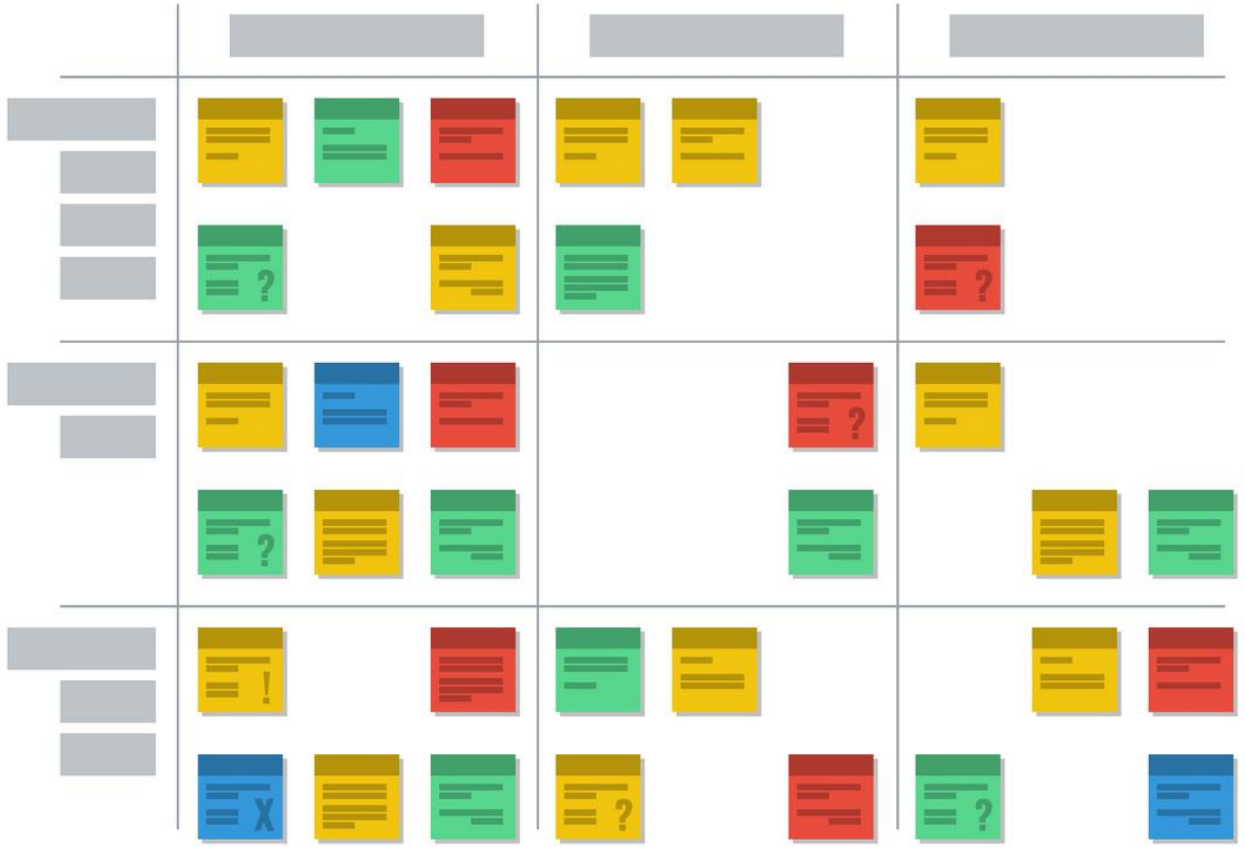
Support Team Task Accountability

Encourage team members to self-organize in determining:

- What work needs to be done
- How to perform the work
- Who should perform it

Use kanban boards to promote visibility and collaboration.

Agile teams commit to performing work listed on a backlog during an iteration.



Show Roles and Responsibilities

RAM/RACI

Some accountabilities are set and nontransferable, even on agile teams. Can anyone give an example?

Responsibility assignment matrix (RAM):

- Describes participation by various project roles in completing work or deliverables
- Clarifies roles and responsibilities

Uses **RACI** nomenclature:

- **R**esponsible: Does the work
- **A**ccountable: Approves completion
- **C**onsulted: Gives expert opinion
- **I**nformed: Kept up to date

Project manager creates RAM/RACI.

Project manager or team lead works with team to make decisions about roles and responsibilities.

Curate Knowledge as an Asset

Document **explicit knowledge** for archival and sharing.

Encourage individuals to share **tacit knowledge** and collaborate.

Treat knowledge as an asset to the team and organization.

Incorporate Knowledge Transfer Opportunities

- Networking
- Special interest groups — e.g., **Communities of Practice**
- Meetings, seminars or other in-person and virtual events
- Training
- **Work/job shadowing**

Knowledge Management

Three Levels

Individual *What do team members need to know to perform project work?*	Acquire required knowledge through research and collaboration with other team members
Project *What's required to achieve project goals?*	Transfer knowledge from other projects and consult the project management office (PMO)
Organization *What's required to manage programs or portfolios?*	Adapt knowledge from other programs/portfolios and tailor

Learn the Right Way to Motivate Your Team

DO

- Inspire and motivate yourself and the team – provide opportunities, not obligations
- Give virtual teams constant and regular contact
- Provide appropriate training opportunities
- Try self-assessment and reflective moments for professional growth

DON'T

- Overwhelm with meetings and work interruptions
- Distract with non-project work
- Force group activities

Continuously Realign Team Efforts with Value Delivery

Tuckman's ladder

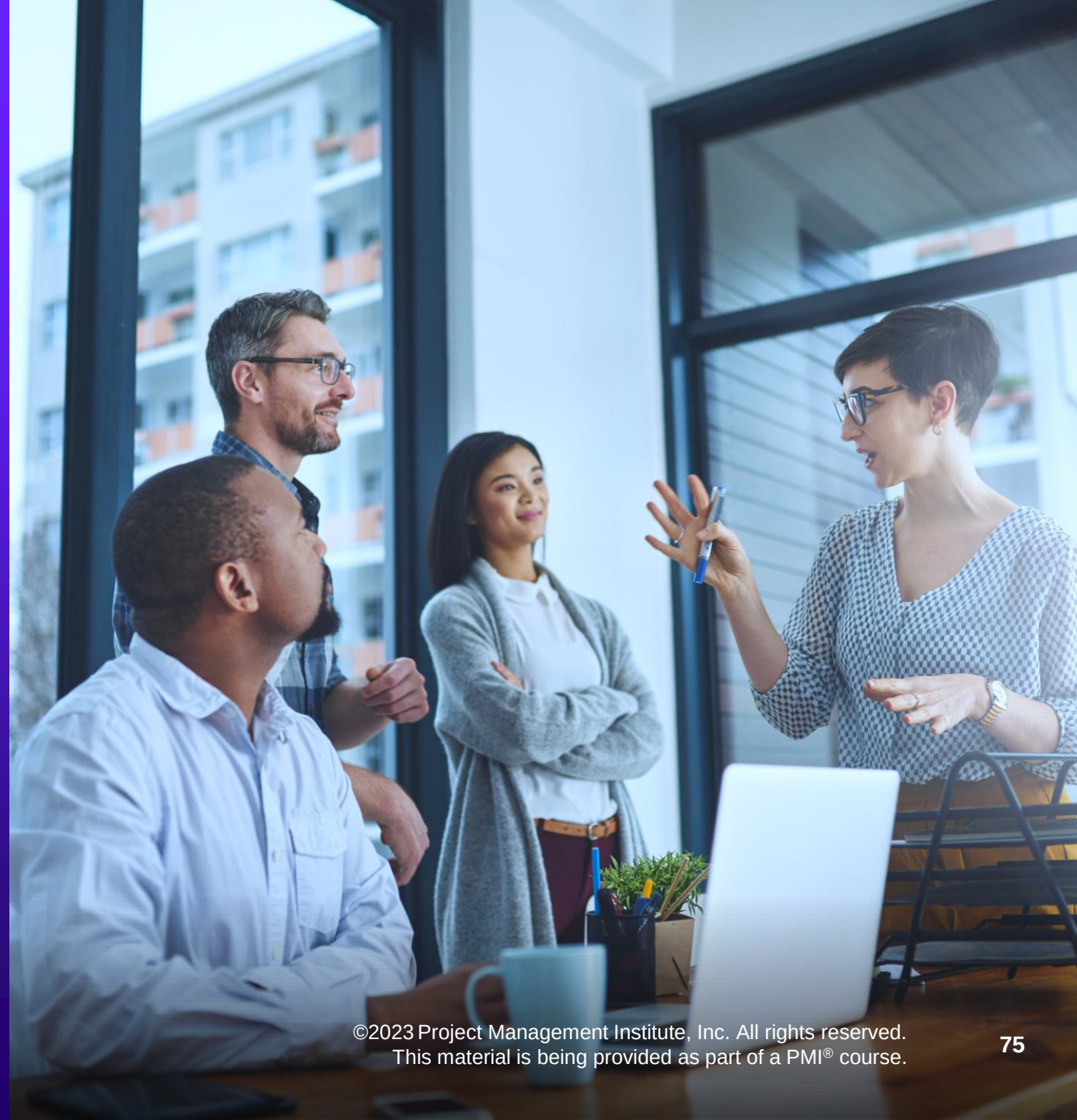
Prioritize team cohesion and focus on value delivery

As team members or external parties join or depart, or during change or disruption, support the team as it realigns itself

- Welcome each new member as a potential **source of new knowledge** and **motivation**
- Ensure **shared understanding** of project goals and agreements
- Collaborate to find out how they can **add value**
- Navigate disruptions and conflict constructively

Check on Artifact Maintenance

- Make it part of regular quality checks
- Keep file storage organized and versioned
- Ensure compliance with data protection and security mandates
- Maintain artifacts in preparation for archiving during project closure



ECO Coverage

2.2 Manage communications

- Communicate project information and updates effectively (2.2.3)
- Confirm communication is understood and feedback is received (2.2.4)

1.4 Empower team members and stakeholders

- Support team task accountability (1.4.2)
- Evaluate demonstration of task accountability (1.4.3)

1.6 Build a team

- Continuously assess and refresh team skills to meet project needs (1.6.3)
- Maintain team and knowledge transfer (1.6.4)

1.11 Engage and support virtual teams

- Continually evaluate effectiveness of virtual team member engagement (1.11.4)

2.11 Manage project artifacts

- Continually assess the effectiveness of the management of the project artifacts (2.12.3)

2.13 Determine appropriate project methodology/methods and practices

- Use iterative, incremental practices throughout the project life cycle (e.g., lessons learned, key stakeholder engagement, risk) (2.13.4)

Evaluate Project Progress

TOPIC C

Guidelines to Measuring Performance

"Only Measure What Matters"

- John Doerr

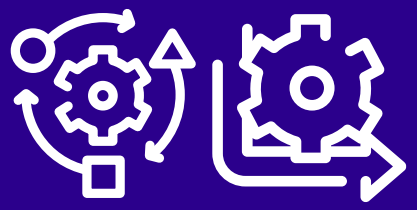
Tailor performance measurement to the project context and stakeholders:

- **Scope**
  - Percentage of work completed
  - Change requests
- **Schedule**
  - Actual duration of work against projected start and finish dates
- **Budget**
  - Actual costs
  - Check procurements are sufficient for needs
- **Resources**
  - Team allocations/availability/procurement
  - Performance appraisals – team, including vendors
  - Contract management
- **Quality**
  - Technical performance
  - Defects
- **Risk**
  - Risk register

Report on Performance

Tailor If Required

Milestone schedule	High-level visualization of progress on work against planned dates
Quality reports	Charts and reports based on the quality metrics collected
Earned value management (EVM) reports	Graphs and values based on EVM equations
Variance analysis reports	Graphs and their analysis comparing actual results to expected results.
Work performance reports	Physical or electronic representation of work performance information compiled in project documents, intended to generate decisions, actions, or awareness.
Dashboards	Physical or electronic progress summaries, usually with visuals or graphics to represent the larger data set



Monitor Scope

	Description of Scope	Method
	Scope baseline is: • Approved version of the project scope statement • Work breakdown structure (**WBS**) • Associated **WBS dictionary**	**Measure completion** of **project scope** against the **scope baseline**.
	Scope evolves from: • Initial product roadmap to • Release backlog to • Iteration backlogs **Backlogs** (including product features and functions and user stories) reflect identified, updated and reprioritized product needs	Check **user stories** and **DoD** against **customer feedback** and **product requirements**
	Any combination of the above	

Scope Validation

Customer Accepts Completed Deliverables

Acceptance criteria

- Definition of ready (DoR)
- Definition of done (DoD)
- Acceptance criteria
- Iteration reviews

Any combination of the above

In a predictive development approach, which artifact helps determine the acceptance criteria?

a. Responsibility traceability matrix
b. Scope statement
c. Team charter
d. Stakeholder engagement plan

In an adaptive development approach, what helps determine that the acceptance criteria for user stories has been met?

a. Product roadmap
b. Definition of done
c. Release plan
d. Kanban board

Measure Schedule Performance

Methods

Gantt charts: Schedule performance tracking over time

Earned value: Cost and effort performance tracking against planned value (PV)

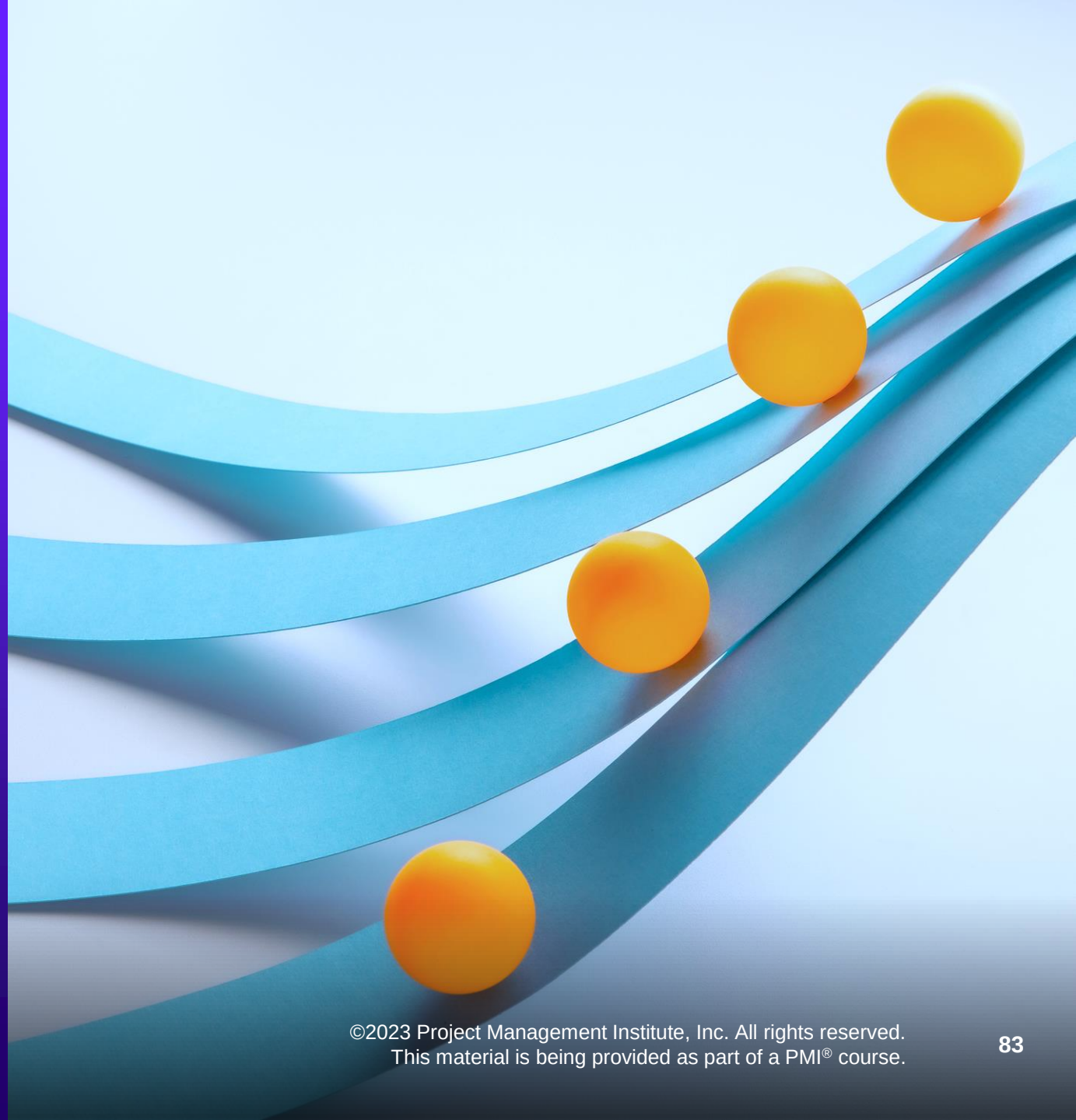
Quality metrics: Track quality deliverables, defects and acceptable output

Variance analysis: Shows where the project is against where it should be

- Compare work delivered and accepted to estimations for the current iteration/sprint
- Review completed work in regular sprint demos
- Determine production, validation, and acceptance rates for deliverables in **retrospectives**
- Conduct scheduled reviews to record retrospective discoveries

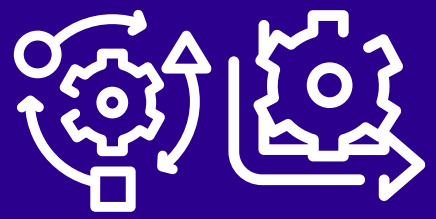
Schedule Management Tools

- Adjust schedule to reflect resource supply/demand
- Use smoothing and leveling
- Use schedule compression techniques, including fast tracking and crashing



Visualize Performance

Show committed versus completed work



- Display visuals or graphics on team dashboards (electronic or physical)
- Show product backlog progress on **burndown** and **burnup** charts
- Display project data and progress on graphic **information radiators** in prominent places
- Measure performance with lead and cycle times with a **cumulative flow diagram**

  - Agile approaches may use **kanban** or **task boards** to visualize project work
  - Continuous flow approaches include **throughput**, **cycle time** and **lead time**
  - Timeboxed approaches include **velocity**

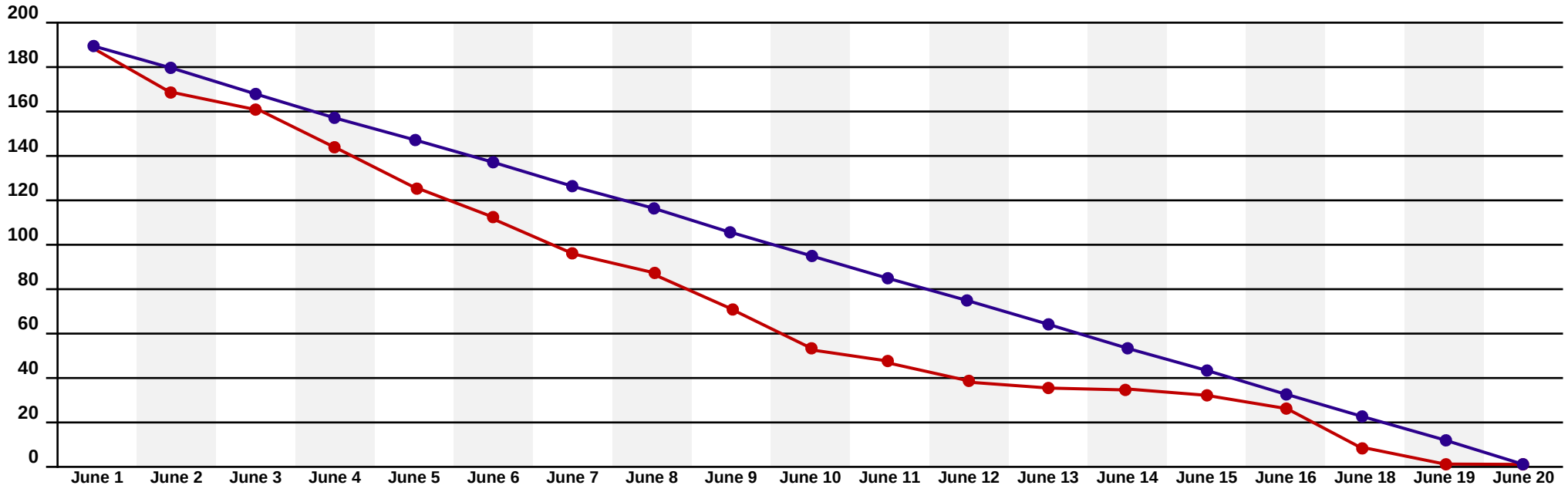
Information Radiators

Burn Charts

Burndown (Iteration)

- Tracks the work to be completed in the iteration
- Used to analyze variance to ideal burndown of work committed to during planning

Diagonal line is ideal burndown against which daily actual remaining is charted.

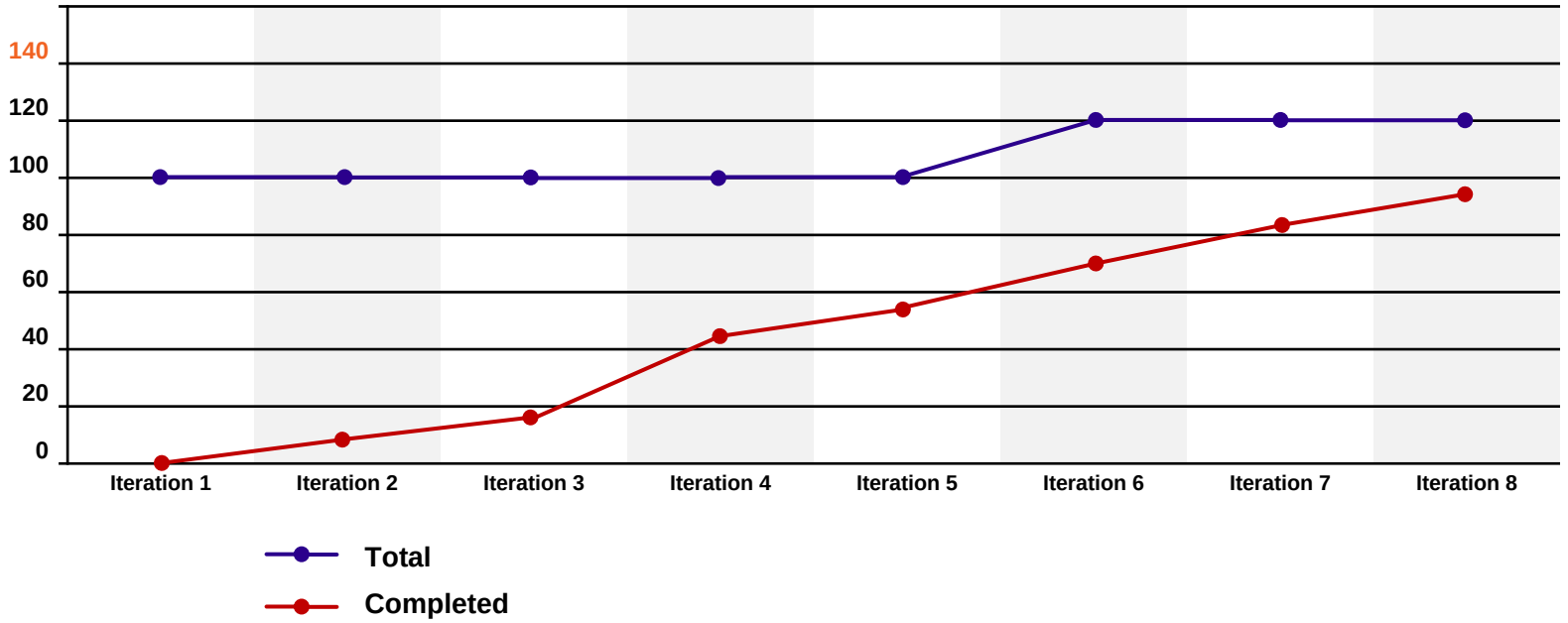


Burn Charts

Burnup (Release)

aka Feature Complete Graph
in feature-driven development (FDD)

- Show accumulated progress of completed work
- Update after each iteration



Task Board

- Organize work into tasks on cards
- Display task information at every stage of the workflow
- Tailor your task board workflow stages

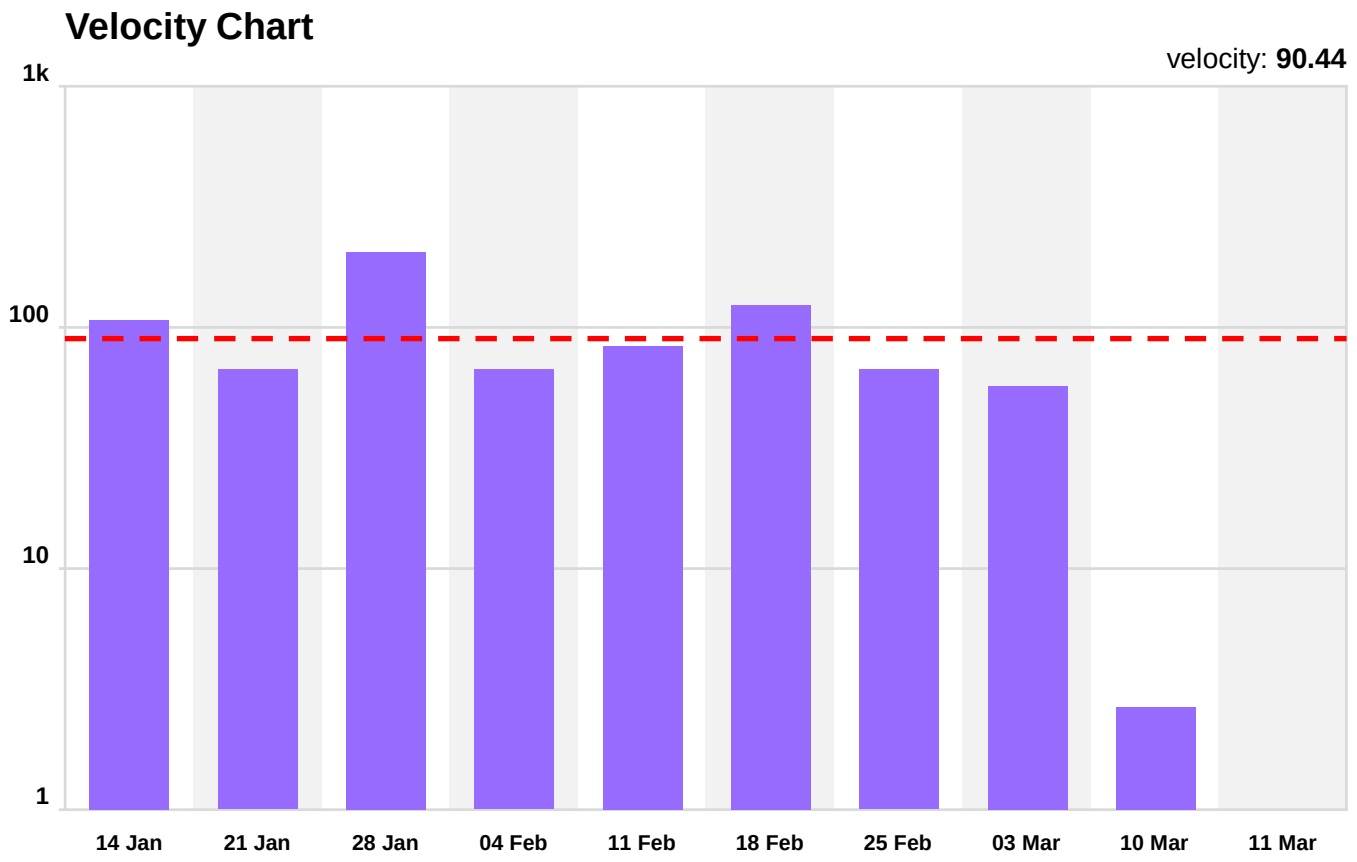
Task board types include Kanban, to-do lists, procedure checklists and scrum boards

Estimate Velocity

Aim for Constant Rate (with optional discussion)

- Team's estimated rate of progress of completed work
- Calculate by estimating number of story points that can be completed during an iteration
- Then modify during subsequent iterations
- Goal: Achieve constant velocity from one iteration to the next

Velocity is a unique metric to a project; it can't be used to compare the performance of teams.

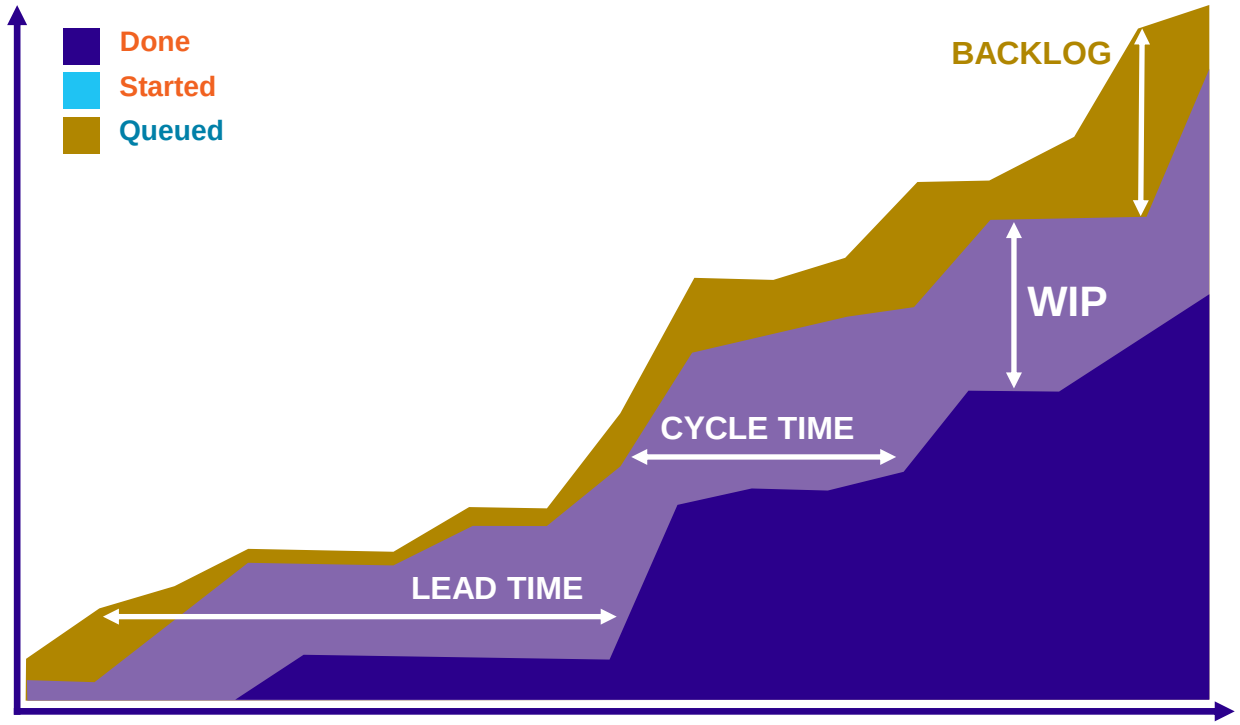


Continuous Flow Approaches

Measure Throughput, Lead and Cycle Time

- **WIP -** Measure of work in progress but not completed
- **Lead time -** Length of time work item goes through entire process
- **Cycle time -** Length of time work item is being worked on
- **Throughput -** Number of items entering or exiting the system

The **C**umulative **F**low **D**iagram



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,

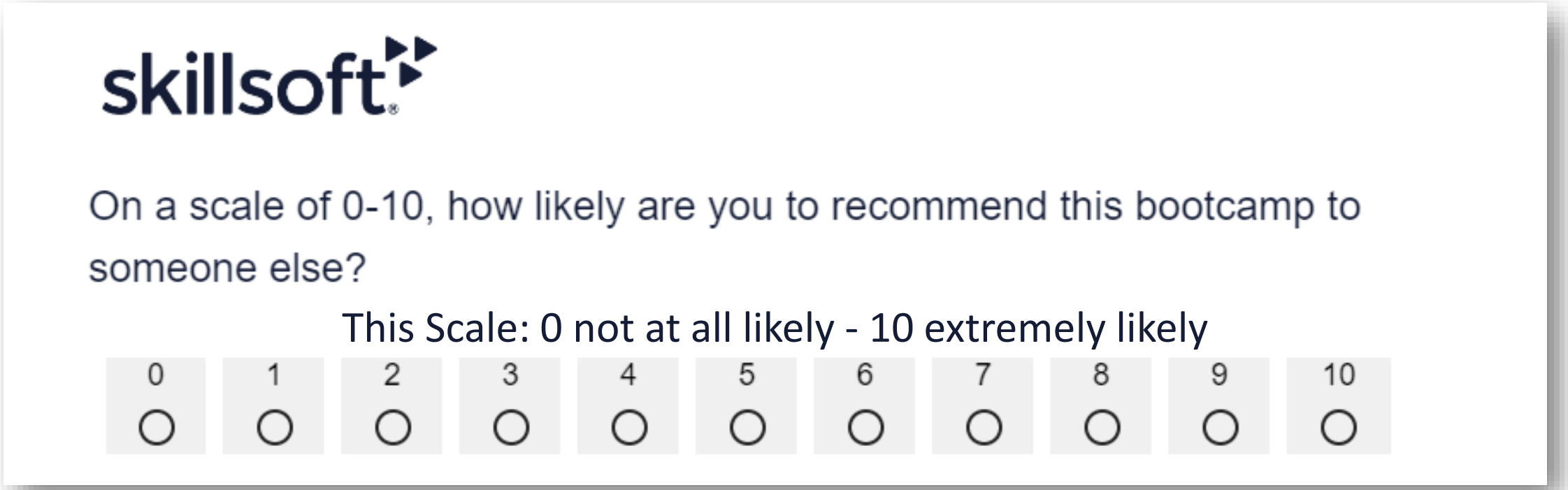
- Let us know **what you liked** about the experience – your comments really matter.
  - Please include a thank you **to the mentor(s)** working off camera.

- If you have **recommendations**, share those too!

We sincerely value your opinion!

Survey Scale

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



INFORMATION RADIATOR

The generic term for visual displays placed in a visible location so everyone can quickly see the latest information. Also known as “Big Visible Chart” in agile.

AGILE COACH

A process role on a project team that helps organizations achieve true agility by coaching teams across the enterprise on how to apply agile practices and choose their best way of working. See also “scrum master.”

TACIT KNOWLEDGE

Personal knowledge that can be difficult to articulate and share such as beliefs, experience, and insights.

LEAN SIX SIGMA

A collaborative team method that provides an enhanced ability to target customer needs and measure performance during project execution and monitoring. It was introduced by American engineer Bill Smith while working at Motorola in 1986.

A/B TESTING

A marketing approach used to determine user preferences by showing different sets of users' similar services—an ‘Alpha’ and a ‘Beta’ version—with one independent variable.

PARETO CHART

A histogram that is used to rank causes of problems in a hierarchical format. See also “80/20 Rule”.

80/20 RULE

A general guideline with many applications; in terms of controlling processes, it contends that a relatively large number of problems or defects, typically 80%, are commonly due to a relatively small number of causes, typically 20%. See also “Pareto Chart”.

EXPLICIT KNOWLEDGE

Knowledge that can be codified using symbols such as words, numbers, and pictures. This type of knowledge can be easily documented and shared with others.

TACIT KNOWLEDGE

Personal knowledge that can be difficult to articulate and share such as beliefs, experience, and insights.

COMMUNITY OF PRACTICE (COP)

As described by E. Wenger in his book, Cultivating Communities of Practice, the CoP uses the same basic idea as used by Shell in their off-shore drilling platforms to establish local forums of “experts” with the specific mandate to create an arena in which project managers would feel comfortable sharing their findings and learnings from their projects.

WORK SHADOWING

An on-the-job technique that enables someone to learn about and perform a job while observing and working with another, more experienced person.

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EARNED VALUE (EV)

A measure of work performed expressed in terms of the budget authorized for that work.

104

QUALITY METRIC

A description of a project or product attribute and how to measure it.

105

VARIANCE ANALYSIS

A technique for determining the cause and degree of difference between the baseline and the actual performance.

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