



# PMP® EXAM PREP

## PMI Authorized Training Partner

### BOOTCAMP

### Session 1

**Class times:**

**1:00 pm - 5:00 pm EDT**

**12:00 am - 4:00 pm CDT**

**11:00 am - 3:00 pm MDT**

**10:00 am - 2:00 pm PDT**

**Attendance Tracking Alert**  
**Please log into Zoom with your  
correct first and last name.  
Enter the same information  
for every session.**

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

Instructor:

**Susan Daniels,  
MBA, PMP, DASSM, ATP-I**



This webinar will be recorded  
for quality purposes

Participant cameras and  
microphones are disabled

# Professional Background

**Independent Consultant and Trainer** 2016-current



**Sr. Strategy Integrator**

a \$12 billion enterprise in the healthcare field



**Executive Director**

a multimillion-dollar social services agency



**District Program Coordinator**

a Florida state public assistance program



**Executive MBA**

from Jacksonville University, Summa cum Laude



**Susan Daniels**  
MBA, PMP, DASSM, ATP-I

# Project Management Acumen



## PMI Global Consultant

- Certification Requirements Global Taskforce
- 7th edition PMBOK Standards
- PMP Core Curriculum Co-author
- Northeast Florida Chapter Board of Directors
- Authorized Training Provider – Instructor



## College Instructor

- Davis College of Business
- Matthews College of Computing, Engineering & Construction



## Director, Project Management Programs

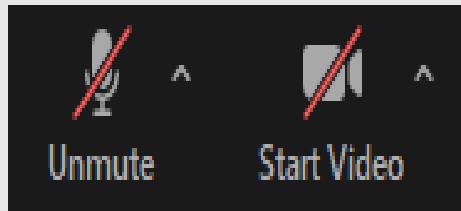
- Director, Nonprofit Leadership Program
- Asst. Professor



**Susan Daniels**

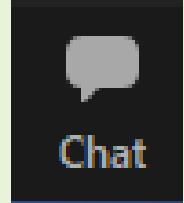
MBA, PMP, DASSM, ATP-I

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



## • Ways to Participate in a Webinar

**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**

# Earning Certificate of Completion Video

Run time 6 minutes

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**PMP Bootcamp Attendance and Certificates of Completion**

# Best Practices for attendance!



You are here!

PMI requires your **live attendance** in class.

## DOs

- When entering the classroom
  - Use your correct first and last name
  - Enter the same email address each time
  - Use that email address for pmi.org registration

## DON'Ts

- Log in with a group of participants

# IS PERFECT ATTENDANCE REQUIRED?

- YES, with allowance for a one-time exception, if you are taking this training to register for taking the PMP exam.
- If you miss more than 15 mins at any time (one time allowed), you will need to make it up by attending the live session in a different 8-day cohort or watching in replay\*.

\*There is a limit to how much content can be watched on replay. **You must contact mentor**



# IN CASE OF ABSENCE

There is a **maximum of two missed sessions** (“missed” means more than 15 minutes) to be eligible to receive your certificate of completion.

The missed sessions must be made up in one of the following ways:

- Percipio users should watch the replay in Percipio.
- All other users should watch the recording in the SharePoint folder.

If you miss more than the as stated above, you will need to make it up by attending the live session in a different 8-week cohort. Please see the Bootcamp calendar at <http://calendar.skillsoft.com/> for information about upcoming sessions.

## REPLAY LIMIT

## Commonly Asked Question

### **Can you confirm my attendance for a certain date, time, or session?**

Attendance is not verified on a per-session basis. If you are in class, logged in with your proper name, and using the same email address for each session, the reporting from Zoom will be accurate.

Your attendance will only be verified once at the end of the cohort using the Zoom report when Skillsoft processes your certificate request.

# ATTENDANCE TRACKER

Session #	Date of attendance	Log in time (EST)	Log out time (EST)	Email address used for login (should be the same every time)	If absent for any period longer than 15 minutes, please note the reason (technical difficulties, etc..)

- It is helpful to keep a record of every session. Don't rely on your memory!

# Certificates of Completion

Will be discussed during Session 8. You may also refer to the course syllabus or the information video "PMP® Attendance and Certificates of Completion".



# Notice Change in Course Cadence

Aug

15

Project Management Professional (PMP) ATP Bootcamp: 8 Day NA Cohort  
August/September/October 2022 Cohort (Sessions 1 to 8)

## REQUIRED DATES AND TIMES

-  Monday, Aug 15, 2022 01:00PM - 05:00PM EDT
-  Monday, Aug 22, 2022 01:00PM - 05:00PM EDT
-  Monday, Aug 29, 2022 01:00PM - 05:00PM EDT
-  **Tuesday, Sep 6, 2022 01:00PM - 05:00PM EDT**
-  Monday, Sep 12, 2022 01:00PM - 05:00PM EDT
-  Monday, Sep 19, 2022 01:00PM - 05:00PM EDT
-  Monday, Sep 26, 2022 01:00PM - 05:00PM EDT
-  Monday, Oct 3, 2022 01:00PM - 05:00PM EDT



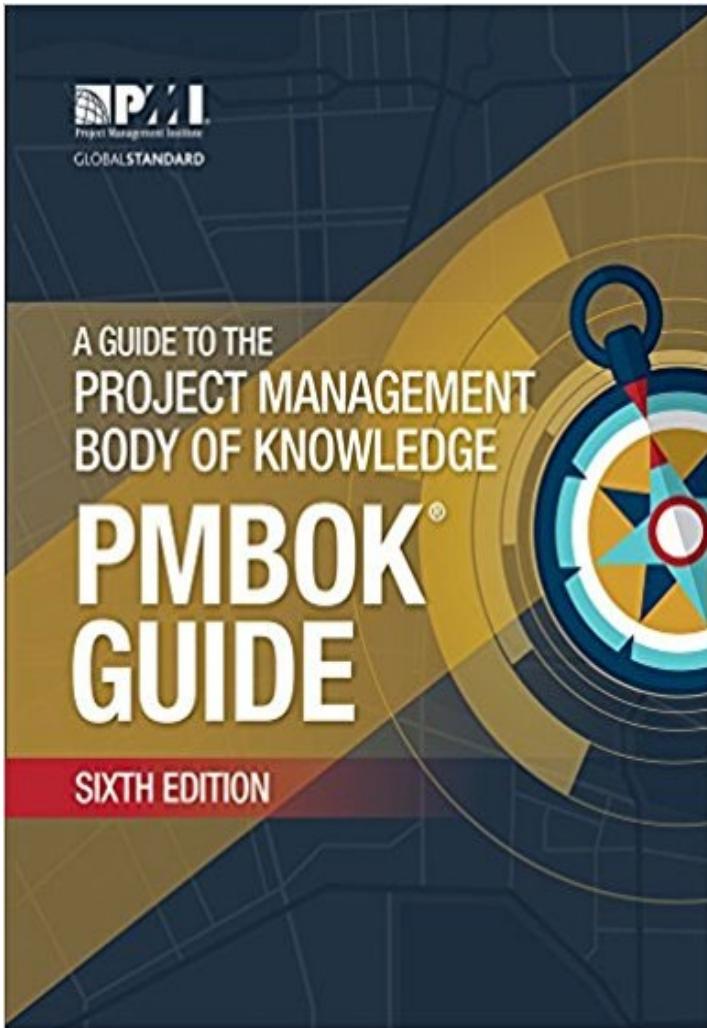


# Class Schedule

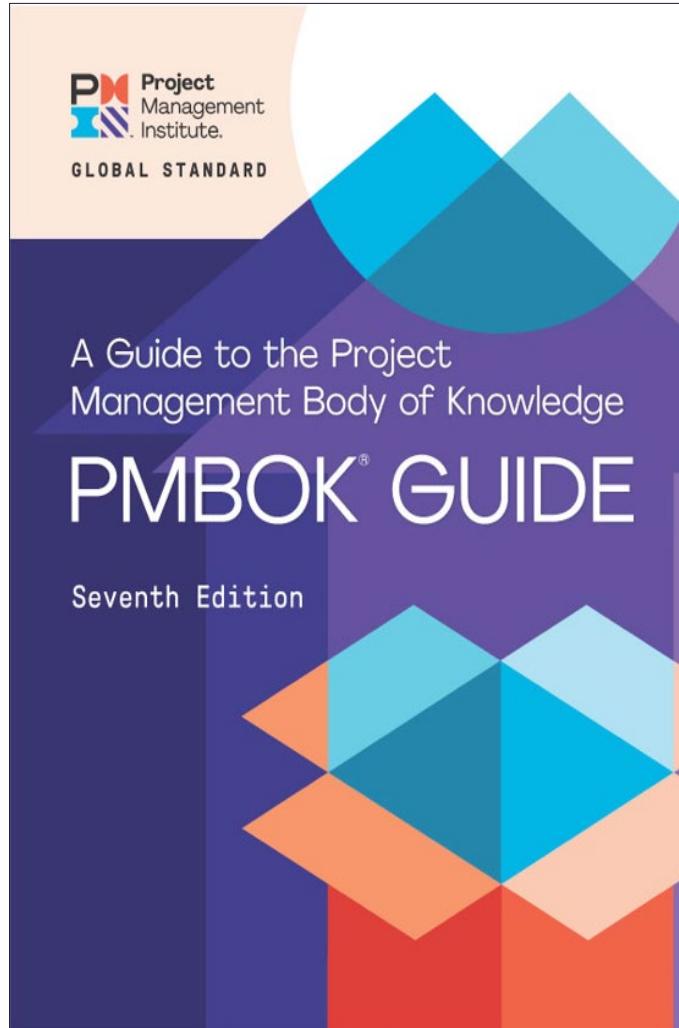
	Example for Eastern Time
1 <sup>st</sup> hour Presentation	1:00-2:00
1 <sup>st</sup> Break	2:00-2:10
2 <sup>nd</sup> hour Presentation	2:10-3:00
2 <sup>nd</sup> Break	3:00-3:10
3 <sup>rd</sup> hour Presentation	3:10-4:00
3 <sup>rd</sup> Break	4:00-4:10
4 <sup>th</sup> hour Presentation	4:10-5:00

# PMBOK GUIDE IS NOT THE PMP® STUDY GUIDE

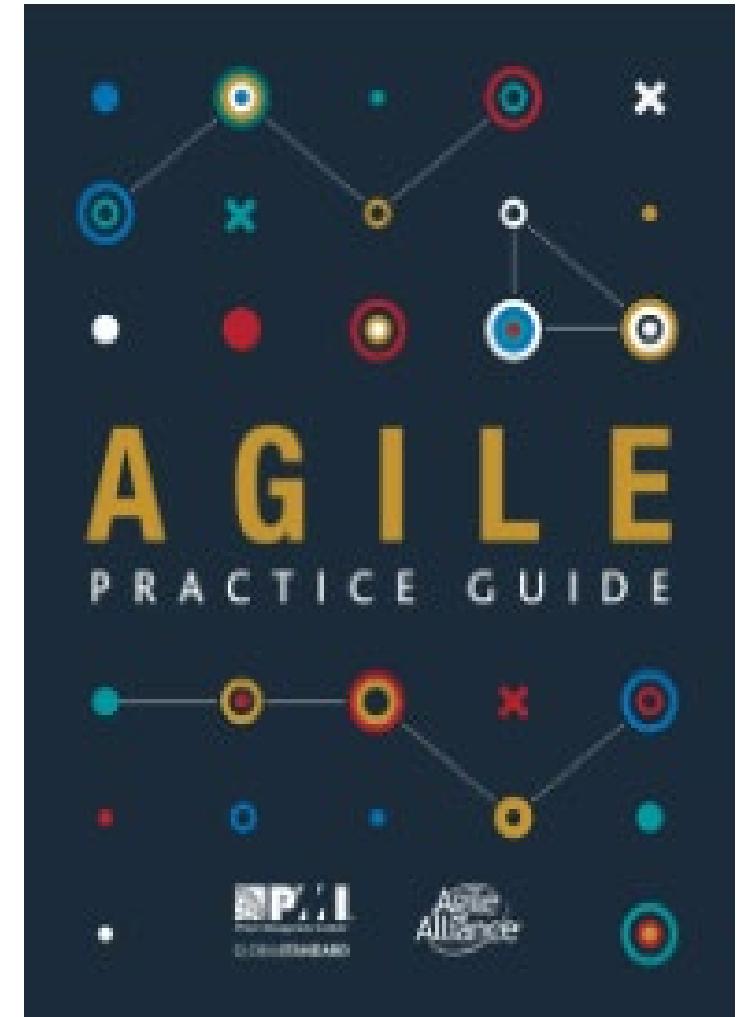
Exam questions can be sourced from *either* edition, or any of the many official references



Digital version found on the PMI Standards+ platform



Digital versions found on PMI.org Standards and Guides



# Study Materials: Skillsoft - Percipio Platform

skillsoft  
**percipio** Library English (US) Susan Daniels

## What would you like to learn today?

PMP ATP NA 8

project management professional (pmp) atm bootcamp: 8 day na cohort

### Resume Learning

[View all >](#)

**Bill Brooks**  
Senior Software Developer

COURSE Agile Organizations: Agile Models &...

Agile 101 2021

**Scrum Guide Revisions**

Professional EDUCATION (35 HOURS FROM SKILLSOFT)

COURSE Scrum Guide (2020 Update): An Overview...

63

COURSE PMP Exam Tips Live Session Replay

106

**BOOTCAMP CALENDAR**

LIVE COURSE Skillsoft Bootcamp Calendar

968

COURSE Building and Training the Project Team...

529

# Study Materials: Skillsoft - Percipio Platform

The screenshot shows a course page on the Skillsoft Percipio Platform. The main title is "Project Management Professional (PMP) ATP Bootcamp: 8 Day NA Cohort". Below the title, a description states: "This Bootcamp provides Project Managers with the knowledge and skills needed to attain the Project Management Professional (PMP) certification. This course meets". A "View More" link is visible. The course has a rating of 4.5 stars from 56 reviews. The sidebar on the left lists course materials, including "PMP ATP" and "PMP ATP 8 Day NA Cohort Jun/Jul/Aug 2022 Bootcamp". A green box highlights the "PMP ATP 8 Day NA Cohort Aug/Sep/Oct 2022 Bootcamp" section. The main content area shows a video thumbnail for "PMBOK Guide Seventh Edition Replay Session" with a duration of 1h 59m 7s and 47 reviews. The footer notes that it is a replay of a live session on October 22nd at 11 AM Eastern.

Ask a Mentor 56

# Project Management Professional (PMP) ATP Bootcamp: 8 Day NA Cohort

This Bootcamp provides Project Managers with the knowledge and skills needed to attain the Project Management Professional (PMP) certification. This course meets

[View More](#)

PMP ATP: PMP ATP

PMP ATP 8 Day NA Cohort  
Jun/Jul/Aug 2022 Bootcamp

Documents

Practice Attend Resources

**PERFOR STAKEHOLDERS**

PMP ATP 8 Day NA Cohort  
Aug/Sep/Oct 2022 Bootcamp

Documents

Project Management Professional Certification (PMP) (2021 Update Aligned)

COURSE | 1h 59m 7s

47

## PMBOK Guide Seventh Edition Replay Session

This is a replay of the live session on October 22nd at 11 AM Eastern. In this session Barb Waters

# Study Materials: Skillsoft - GITHUB Platform

<https://github.com/Skillsoft-Content/PMP8Day>

Skillsoft-Content / PMP8Day Public

<> Code Issues Pull requests Actions Projects Wiki Security Insights Settings

main 1 branch 0 tags Go to file Add file Code

**Aug 15 Specific Files** → **\*NA Cohort Aug Sep Oct 2022 Bootc...** Create Test 48678ea now 65 commits 3 minutes ago

**\*NA Cohort Jun Jul Aug 2022 Bootca...** Delete Test 3 minutes ago

**\*UK and APAC Cohort Jul Aug Sep 20...** Delete Test now

**Common Files** → **8-Week Attendance and Certificates ...** Add files via upload 2 months ago

**Class Links** Add files via upload 21 days ago

**Documents (Syllabus, Exam Content ...** Add files via upload 2 months ago

**PMP Learner Kit Information Video** Add files via upload 4 months ago

**PMP Vocabulary** Add files via upload 4 months ago

The screenshot shows a GitHub repository named 'Skillsoft-Content / PMP8Day'. The repository is public. The main page displays a commit from 'Skillsoft-Content Delete Test' with the commit hash '48678ea' and 65 commits, made 3 minutes ago. Below this, there are two more commits: one for 'Delete Test' and another for 'Delete Test'. A red box highlights the commit for 'Delete Test' under 'Aug 15 Specific Files'. Another red box highlights a group of five common files: '8-Week Attendance and Certificates ...', 'Class Links', 'Documents (Syllabus, Exam Content ...', 'PMP Learner Kit Information Video', and 'PMP Vocabulary'. Red arrows point from the labels 'Aug 15 Specific Files' and 'Common Files' to their respective highlighted sections.

# PMP® Learner Kit

- Please note that **students pursuing their PMP certification** must have their own Learner Kit.
- The Learner Kit vouchers must be purchased through Skillsoft and redeemed through PMI.
- Please contact your corporate training staff/sponsor for more information before purchasing it yourself
- You can purchase the PMI Learner Kit directly through Skillsoft. (available in Percipio and SharePoint)



▶ **Questions?**  
**Watch the 5-minute**  
**Information Video**

# Ordering Your Own Learner Kit

## PMI/PMP LEARNER KITS

Congratulations on taking the next step in your career to get or renew your PMP Certification!

Purchasing the Learner Kit is one step in the right direction. Here are the required things you'll need to receive the Authorized Training Program (ATP) certification to qualify for the PMP exam:

- ▶ Project Management Institute Membership
- ▶ 35 hours of LIVE PMI training by taking the Skillsoft PMP Bootcamps  
[request a certificate here](#) | [Find a LIVE PMP Bootcamp](#)
- ▶ A PMP Learner Kit

BUY A PMP LEARNER KIT NOW ►  
FOR \$110 USD

[Click Here to  
Order Your  
Learner Kit](#)

<https://www.skillsoft.com/pmp-voucher-offering>

# IS THE LEARNER KIT REQUIRED FOR EVERY STUDENT?

The Learner Kit is required only for those who register for the PMP® Certification Exam

You do not need the learner kit to:

- take a course for Professional Development Units (PDUs)
- take a course to learn about project management
- complete your PMP application

You do need the learner kit to:

- follow the PMI and Skillsoft recommended steps
- demonstrate that you are working with an Authorized Training Partner (ATP)



# PMP® EXAM CONTENT RESOURCES

*This list represents over 5,000 pages of reading!  
We distill this information to include only  
what the learner needs to know.*

The Project Management Institute states that, “it should also be noted that the references identified herewith are but one element of a broader set of educational resources and texts that might possibly be utilized for exam and study preparation”.

Book	Author
Agile Practice Guide	Project Management Institute
A Guide to the Project Management Body of Knowledge (PMBOK® Guide)	Project Management Institute
Project Management: A Systems Approach to Planning	Project Management Institute
Effective Project Management: Traditional and Agile	Mark R. McCulloch
Fundamentals of Technology for Project Managers	Mark R. McCulloch
Project Managers Portable Handbook	Mark R. McCulloch
Information Technology Project Management	Mark R. McCulloch
Essential Scrum: A Practical Guide to the Most Popular Agile Process	Jeff Sutherland and Scrum.org
Project Management: The Manager's Guide to Planning, Executing, and Evaluating	Tom Kendrick
The Project Management Toolkit	Tom Kendrick

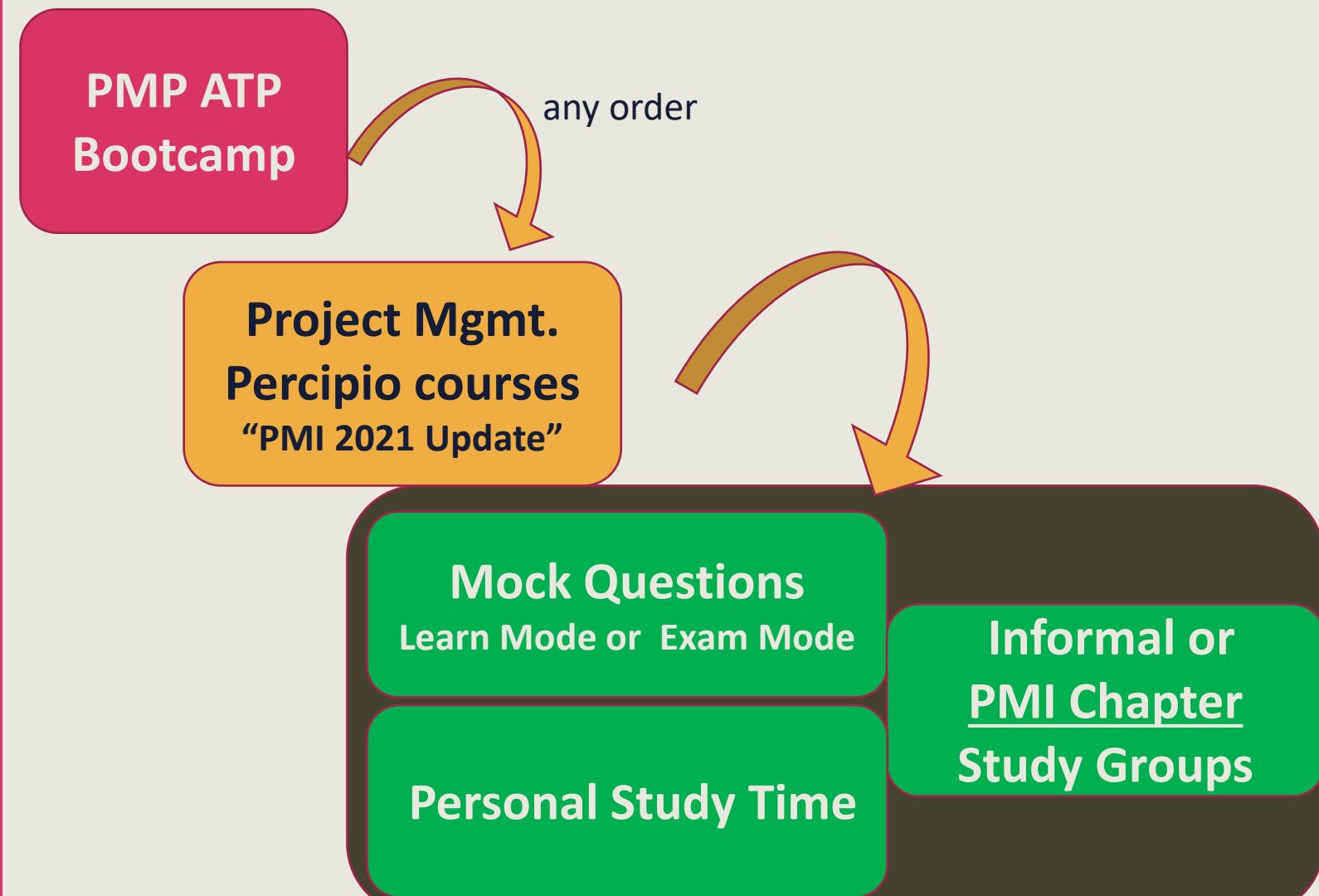
That is the advantage of the  
Authorized Training  
Provider  
Exam Prep Course!

... Done Right

# **BEST LEARNING OUTCOMES**

Bootcamp,  
Percipio, &  
Exam Simulator

**Successful candidates spend 80-100 hours  
preparing for the exam after taking the  
PMP Boot Camp**



# Spotlight Video: Preparing for the PMP Exam

## EXAM PREPARATION

For complete exam information, visit the

**Project Management Institute at [pmi.org](http://pmi.org)**

- Exam prerequisites
- Exam content outline
- Handbook



# DOMAINS, TASKS, AND ENABLERS



People, Processes,  
Business Environment

**Domain:** high-level knowledge area



People, Lead a Team

**Task:** underlying responsibilities



Set a clear vision and  
mission

**Enablers:** examples of the work associated with a task

# PMP® EXAM CONTENT OUTLINE (ECO)

- PMP® Exam Content Outline is the *syllabus* of the PMP exam.
- Questions will come from these tasks and enablers.

TIP:

Print the PMP Exam Content Outline

Weekly identify your **STRENGTHS, AREAS OF IMPROVEMENT AND WEAKNESSES**

Domain I		People—42%
Task 1	<b>Manage conflict</b> <ul style="list-style-type: none"><li>• Interpret the source and stage of the conflict</li><li>• Analyze the context for the conflict</li><li>• Evaluate/recommend/reconcile the appropriate conflict resolution solution</li></ul>	
Task 2	<b>Lead a team</b> <ul style="list-style-type: none"><li>• Set a clear vision and mission</li><li>• Support diversity and inclusion (e.g., behavior types, thought process)</li><li>• Value servant leadership (e.g., relate the tenets of servant leadership to the team)</li><li>• Determine an appropriate leadership style (e.g., directive, collaborative)</li><li>• Inspire, motivate, and influence team members/stakeholders (e.g., team contract, social contract, reward system)</li><li>• Analyze team members and stakeholders' influence</li><li>• Distinguish various options to lead various team members and stakeholders</li></ul>	
Task 3	<b>Support team performance</b> <ul style="list-style-type: none"><li>• Appraise team member performance against key performance indicators</li><li>• Support and recognize team member growth and development</li><li>• Determine appropriate feedback approach</li><li>• Verify performance improvements</li></ul>	
Task 4	<b>Empower team members and stakeholders</b> <ul style="list-style-type: none"><li>• Organize around team strengths</li><li>• Support team task accountability</li><li>• Evaluate demonstration of task accountability</li><li>• Determine and bestow level(s) of decision-making authority</li></ul>	

# Exam Prep Curriculum Lessons



Lesson 1

Creating a High-Performing Team



Lesson 2

Starting the Project



Lesson 3

Doing the Work



Lesson 4

Keep the Team on Track



Lesson 5

Keeping the Business in Mind

# Your PMP Bootcamp Course Syllabus

Today's topics are highlighted in yellow.

Creating a High-Performing Team		Starting the Project	Doing the Work	Keeping the Team on Track	Keeping the Business in Mind
	Lesson 1	Lesson 2	Lesson 3	Lesson 4	Lesson 5
Topic A	Build a Team	Determine Appropriate Project Methodology/Methods and Practices	Assess and Manage Risks	Lead a Team	Manage Compliance Requirements
Topic B	Define Team Ground Rules	Plan and Manage Scope	Execute Project to Deliver Business Value	Support Team Performance	Evaluate and Deliver Project Benefits and Value
Topic C	Negotiate Project Agreements	Plan and Manage Schedule	Manage Communications	Address and Remove Impediments, Obstacles, and Blockers	Evaluate and Address Internal and External Business Environment Changes
Topic D	Empower Team Members and Stakeholders	Plan and Manage Budget and Resources	Engage Stakeholders	Manage Conflict	Support Organizational Change
Topic E	Train Team Members and Stakeholders	Plan and Manage Quality of Products and Deliverables	Create Project Artifacts	Collaborate with Stakeholders	Employ Continuous Process Improvement
Topic F	Engage and Support Virtual Teams	Integrate Project Planning Activities	Manage Project Changes	Mentor Relevant Stakeholders	
Topic G	Build Shared Understanding about a Project	Plan and Manage Procurement	Manage Project Issues	Apply Emotional Intelligence to Promote Team Performance	
Topic H		Establish Project Governance Structure	Ensure Knowledge Transfer for Project Continuity		
Topic I		Plan and Manage Project/Phase Closure			

## LESSON 1

# CREATING A HIGH-PERFORMING TEAM

- Build a Team
- Define Team Ground Rules
- Negotiate Project Agreements
- Empower Team Members and Stakeholders
- Train Team Members and Stakeholders
- Engage and Support Virtual Teams
- Build a Shared Understanding about a Project





# Build a Team

TOPIC A

# Deliverables and Tools



Skills list  
Technology  
Resource Management Plan  
Rates  
Resource assignment



RACI matrix  
Pre-assignment tools  
Virtual teams

Build a Team  
LESSON 1  
TOPIC A

Project Resource Management includes the processes to identify, acquire and manage the **human resources** needed to successfully complete a project.



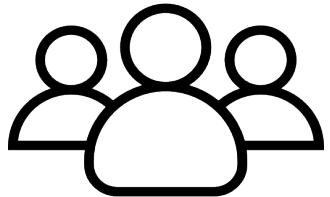
# Project Teams

To assemble your high-performing project team:

- ✓ Estimate, acquire, and manage teams of people as well as human resources required outside of the team - special skills.
- ✓ Create an effective team environment with excellent communication and talent development capabilities.
- ✓ Track team performance, create and execute improvements based on feedback, resolve issues, and manage team personnel changes.



# Project Team Member Requirements

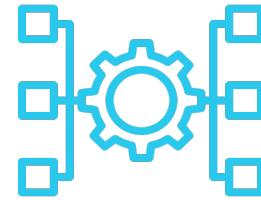


Ensure relevant skill sets to perform work and produce the desired results.

Avoid single-points-of-failure  
e.g. a single resource has a required skill.



Leverage core competencies and skills of general specialists to support other areas of the project.



Adequate physical resources  
e.g. equipment

Other requirements  
e.g. access rights

Build a Team  
LESSON 1  
TOPIC A

# Project Stakeholders



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Build a Team  
LESSON 1  
TOPIC A

# **Spotlight Video: Leading Without Authority**

# Stakeholder Identification



## Identify the People

- ✓ Usually done during project charter development; continues as needed.
- ✓ Analyze and document stakeholder interest, involvement, interdependencies, influence, and potential impact on project success.
- ✓ Look for additional stakeholders in change logs, issue logs, or requirement documents as work progresses.



## Create the Register

- ✓ The stakeholder register may be affected by organizational environment factors.
- ✓ Project plans should describe stakeholders and the planned engagement model.
- ✓ Refer to stakeholder registers from previous projects.

Build a Team  
LESSON 1  
TOPIC A



## Stakeholder Identification - Tools & Techniques

- ✓ Expert judgment
- ✓ Data gathering
  - Questionnaires and surveys
  - Brainstorming
- ✓ Data analysis
  - Stakeholder analysis
  - Document analysis
- ✓ Stakeholder mapping
  - Two-dimensional grids
    - Power/interest
    - Power/influence
    - Impact/influence
  - Stakeholder cube
  - Directions of influence
- ✓ Meetings

Build a Team  
LESSON 1  
TOPIC A

# Stakeholder Register

STAKEHOLDER REGISTER

Name	Organization	Project Role	Major Requirements	Expectations	Influence	Areas of Interest	Internal/External	Supporter?
Linda Michaels	CEO	Sponsor	Budget, schedule, quality	Community involvement	Major	Community	Internal	Yes
Ron Gordon		Mortgage lenders		Growth	Major	Development	External	Yes
	Community		Neighborhood improvements		Minor	House	External	Yes
Andrews family		Homeowners		Engage family and friends				Yes
	Lumber warehouse	Vendor			Major	Locally sourced supplies		
		Project Manager		Project goes as planned	Major	All	Internal	Yes

Build a Team  
LESSON 1  
TOPIC A

Course: Building and Training the Project Team (2021 Update)

Video: Stakeholder Identification and Collaboration(4:25 run time)

More  
about...

---

**Stakeholder Identification and Collaboration**

# RACI Chart - Example

	Project Manager	Engineering Manager	Quality Assurance Manager	Purchasing Manager	Manufacturing Manager
Create blueprints	A	R	C		C
Manufacture circuit board	I	A	C		R
Test circuit board	I	R	A		C
Order components	C	C	I	R	A
Assemble	I	C	C		R

R = Responsible    A = Accountable    C = Consulted    I = Informed

# Spotlight Video: RACI Chart Creation

# Team Skills Appraisal

Appraisals enable the team to **holistically identify its strengths and weaknesses, assess opportunities for improvement, build trust, and establish effective communication.**

Appraisals might identify:

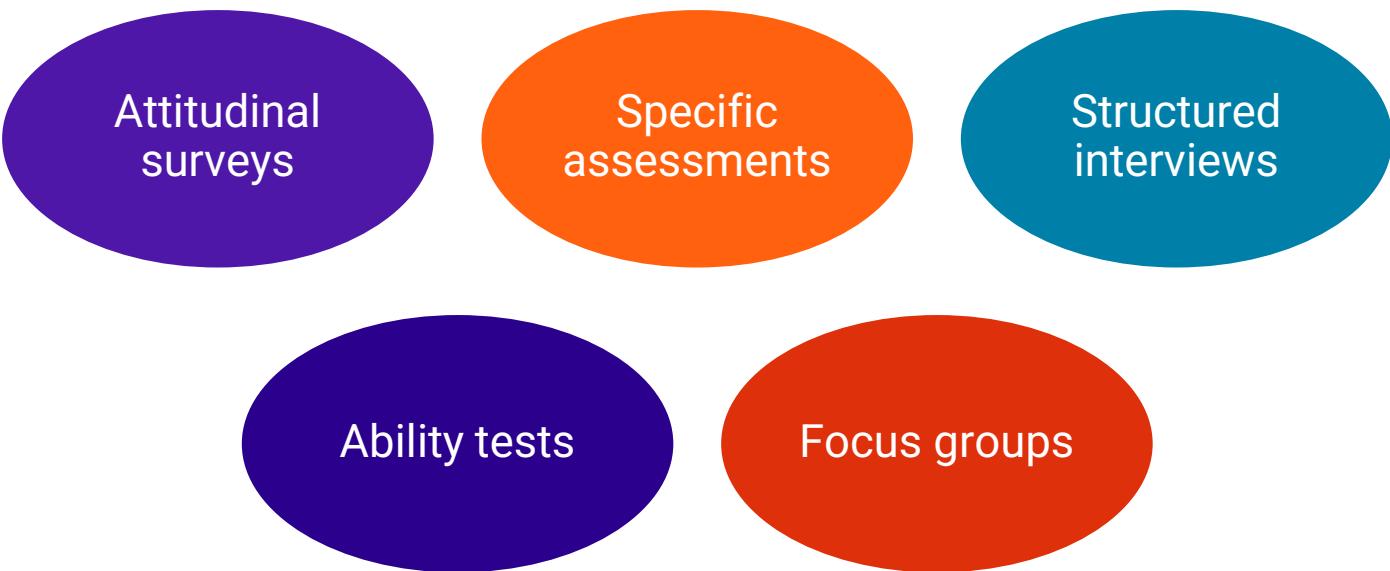
- ✓ Team preferences
- ✓ Aspirations
- ✓ Information processing and organization
- ✓ Decision making processes
- ✓ Interactions with other team members



Build a Team  
LESSON 1  
TOPIC A

# Pre-Assignment Tools

Assess candidates before assigning and confirming team roles.



Build a Team  
LESSON 1  
TOPIC A

# Diversity, Equity and Inclusion

Project teams are global and diverse in **culture, gender, physical ability, language**, etc.

Create an environment that **optimizes the team's diversity** and builds **climate of mutual trust**.

Team development objectives should:

- ✓ **Improve trust** to raise team morale, reduce conflict, and support teamwork.
- ✓ Create a **collaborative culture** to improve individual and team performance and facilitate cross-training and mentoring.
- ✓ **Empower the team** to participate in decision making and own the solutions they create.



# Resource Management Plan



## Roles and Responsibilities

- ✓ Role – A person's function in a project
- ✓ Authority - Rights to use resources, make decisions, accept deliverables.
- ✓ Responsibility - Assigned duties
- ✓ Competence - Skills and capacities required



## What's in the Plan

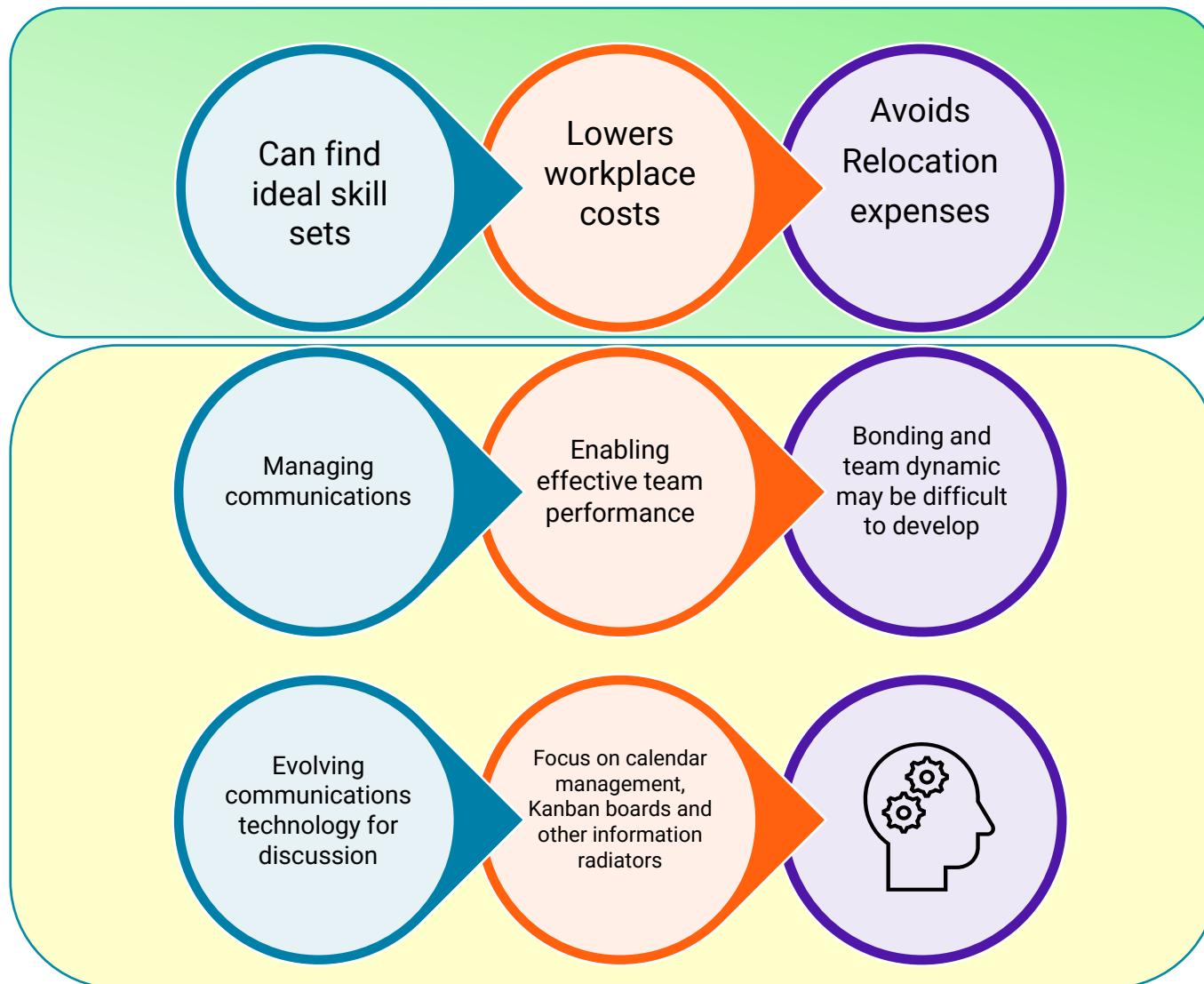
- ✓ Project Organization Chart – visualization of team and reporting relationships
- ✓ Project team resource management - Team resource guidance – How to define, staff, manage, and release.
- ✓ Training strategies and requirements
- ✓ Team development methods
- ✓ Resource controls – To manage physical resources
- ✓ Recognition Plan - To reward/recognize team members

# Virtual Teams

- ✓ Team members share goals but spend little or no time meeting face-to-face.
- ✓ Addressing their needs takes some different skills.



# Virtual Team Considerations



# Spotlight Video: Virtual Teams

# Assign Project Responsibilities

**Tailor** according to team, needs, project.

Consider **technical and “soft” factors**:

- Experience, knowledge, skills
- Attitude, global/regional representation

**Agile** - Self-organizing teams assess work requirements and determine who will do the work.

**Traditional** – You assign work to team members with a work breakdown structure (WBS).



# Rates

The project manager is responsible for considering resource cost factors.

Meet resource requirements cost-effectively and based on:

- ✓ Project needs
- ✓ Suitability of the Resource
  - Availability
  - Experience
  - Knowledge
  - Skills
  - Attitude
  - Regional or linguistic representation





# Resource Assignment

Create a project management plan that includes:

- ✓ Team members assigned to the project
- ✓ Their roles and responsibilities
- ✓ Project team directory
- ✓ Project organization charts
- ✓ Project schedules

# Nurturing Team Performance

Ensure the team has the **knowledge, skills, attributes, and experience** required to produce positive project outcomes.

Gain a better understanding of customer needs and team capabilities to **identify gaps in the team's skill set**.

**Check for these gaps frequently** and seek to close them. Try:

- ✓ New or better resources
- ✓ Training to enable the team to develop missing skills
- ✓ Additional customer engagement to gather data



# Knowledge Transfer In and Between Teams



Facilitate collaboration and promote visibility of work.

Manage knowledge sharing among team members, especially on virtual teams.



Check the team charter for knowledge sharing methods, including:

- ✓ Frequency of updates
- ✓ Version control
- ✓ Supporting tools and agreed approach to their use



Use information radiators to provide seamless visibility into project status across the stakeholder community.

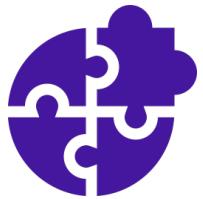
Build a Team  
LESSON 1  
TOPIC A



# Define Team Ground Rules

TOPIC B

# Deliverables and Tools



Team charter  
Team norms



Negotiation skills  
Conflict management  
Brainstorming  
Ethics

Define Team  
Ground Rules  
LESSON 1  
TOPIC B

# Team Norms

**Establish expected team behaviors at the beginning of the project.**

**Enable teams to handle challenges as the project progresses.**

**Include guidelines and techniques for:**

- ✓ Meetings
- ✓ Communications
- ✓ Conflict management
- ✓ Shared values
- ✓ Decision-making

**Align with PMI's Code of Ethics and Professional Conduct**



# PMI Code of Ethics and Professional Conduct



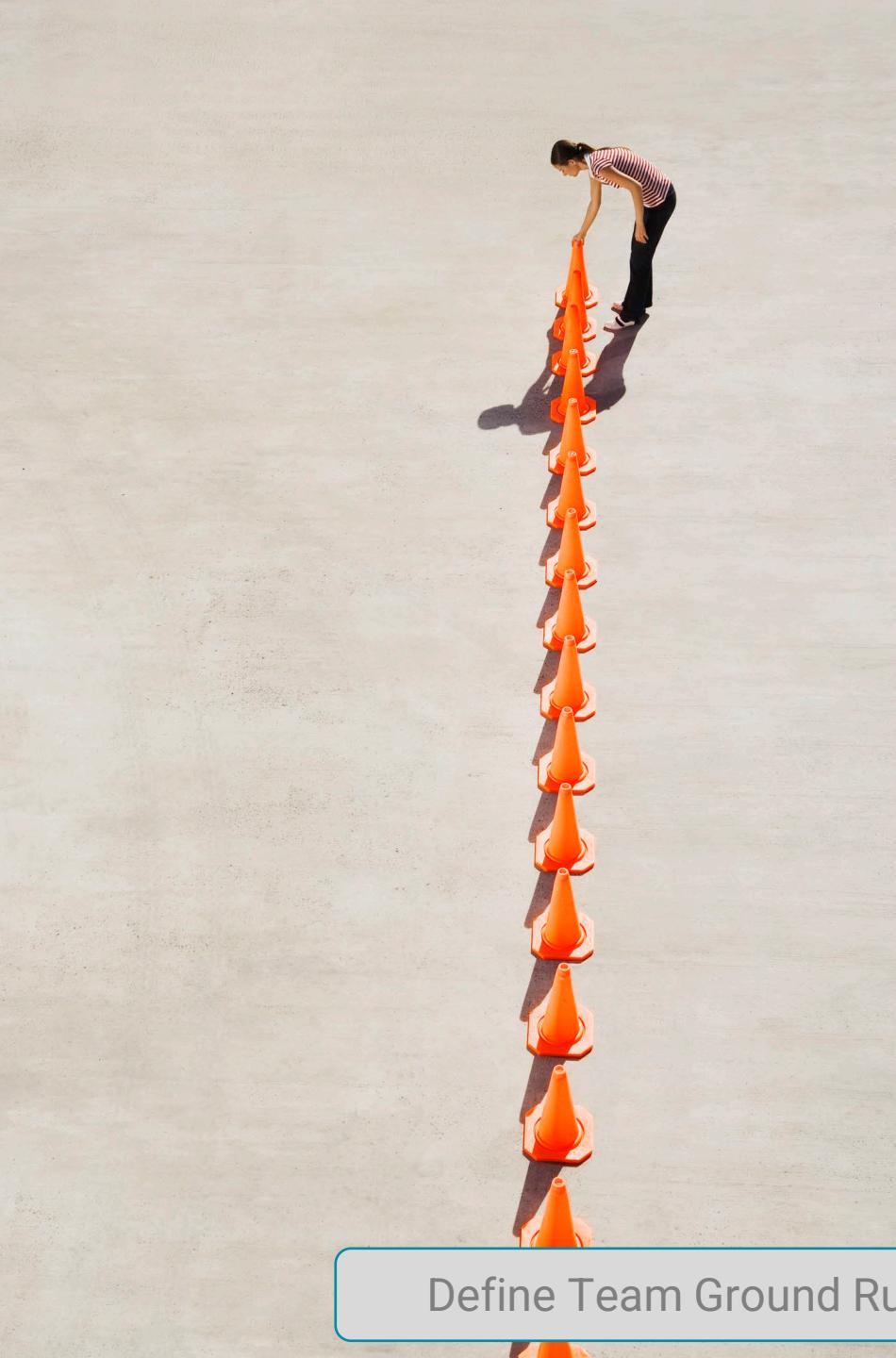
Define Team  
Ground Rules  
LESSON 1  
TOPIC B

# Team Charter

Includes:

- ✓ Shared values
- ✓ Guidelines for communications and use of tools
- ✓ Decision-making guidelines
- ✓ Conflict resolution measures
- ✓ Meeting time, frequency, and channel
- ✓ Other team agreements e.g. shared hours, improvement activities





# Ground Rules

Includes what's acceptable and unacceptable for team behavior

Benefits:

- ✓ Sets performance and communication expectations
- ✓ Decreases risk of confusion
- ✓ Improves team performance

Define Team Ground Rules, LESSON 1, TOPIC B

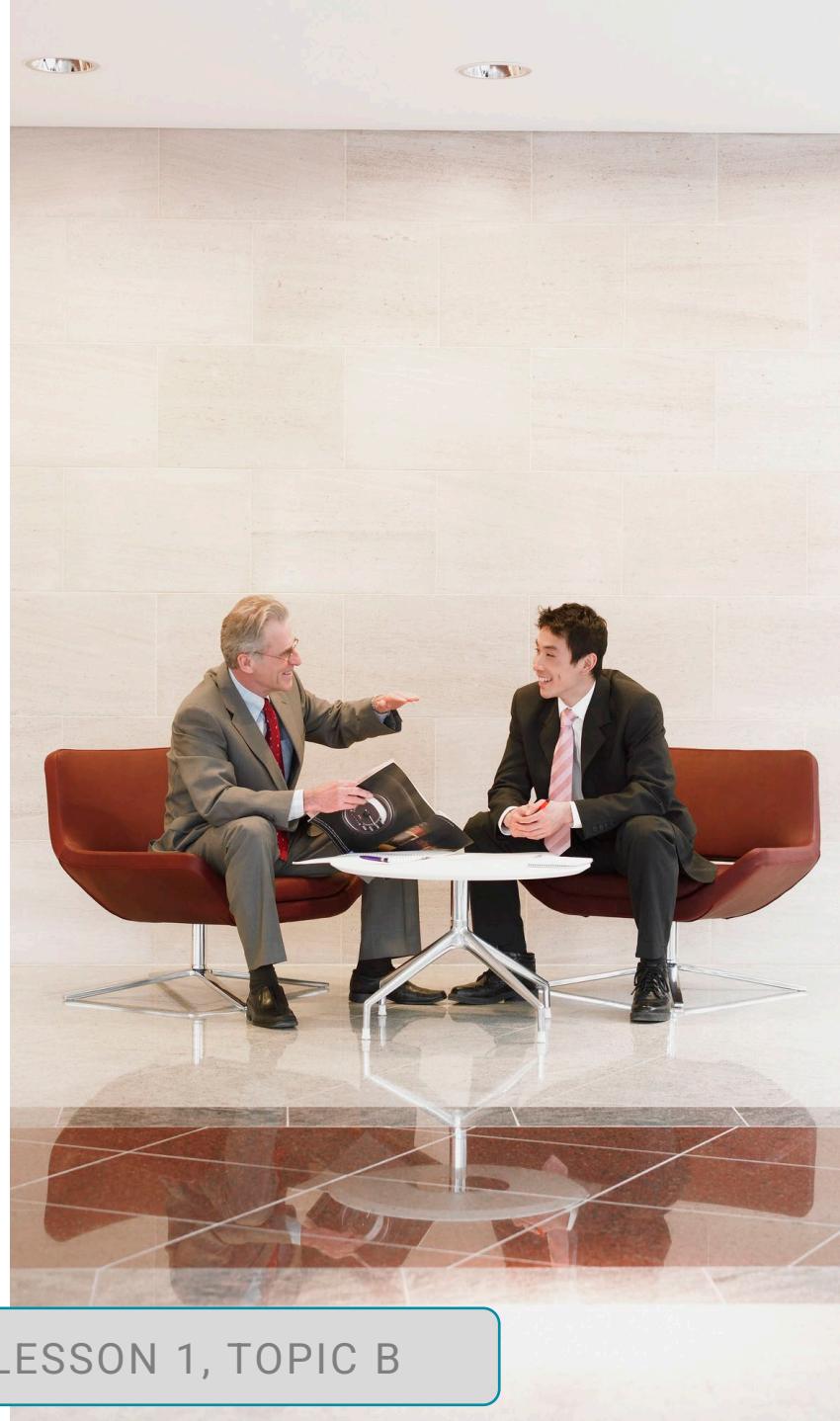
# Negotiation Skills

Includes internal and external conversations towards reaching agreements.

Determine reliable methods to ensure communication is aimed at reaching consensus. This keeps the team culture healthy.

Team members might negotiate:

- ✓ Roles and responsibilities
- ✓ Priorities
- ✓ Assignments





# Internal and External Team Member Communication

- ✓ Communicate **regularly**
- ✓ **Collaborate** between team and external teams or stakeholders
- ✓ **Manage expectations** effectively among stakeholders
- ✓ Include communication protocols in **Team Charter**:
  - **Internal**: team meetings, shared calendars, etc.
  - **External**: stakeholder feedback, dependency management, alignment with goals or expectations

# Conflict Management

Apply strategies or resolution methods to deal with disagreements



Leads to improved understanding, performance, and productivity



Ineffective conflict management leads to:

- Destructive behavior
- Animosity
- Poor performance
- Reduced productivity



## GUIDELINES

# Manage and Rectify Ground Rule Violations

- Establish ground rules in the Team Charter. Focus on core values including accountability, shared expectations, and transparency
- Team and project manager respond to violations of the ground rules.
- For serious violations, you may need to remove or replace the offending team member.

Define Team  
Ground Rules  
LESSON 1  
TOPIC B





# Negotiate Project Agreements

TOPIC C

# Deliverables and Tools



Service Level Agreement  
Performance report  
Resource calendars  
Go-Live Blackouts



Negotiation skills  
Expert judgment  
Lessons learned

Negotiate  
Project  
Agreements  
LESSON 1  
TOPIC C

# Project Agreement Objectives

Reporting and verification criteria for objectives are an important part of the project agreement.

**Traditional** – Identify each deliverable and objective acceptance criteria for each.

**Agile** – Deliverables will vary as the product backlog is added to, reprioritized, and so forth.

Each story needs to have clearly defined acceptance criteria approved by the customer.

The project may also specify a **Definition of Done** for the project, releases, iterations, and user stories.



# Agreements

Agreements define **initial intentions** for a project. These can be:

- ✓ Contracts - used for external customers
- ✓ Memorandums of understanding (MOUs)
- ✓ Service level agreements (SLA)
- ✓ Letters of agreement or intent
- ✓ Verbal agreements
- ✓ Email

## Sample Service Level Agreement

### Service Scope and Description Statement

The agreement covers the provision and support of a Service, which provides end user computer support. The DESKTOP COMPUTING SERVICE consists of the hardware, software, and supporting infrastructure for user personal computers running the Windows operating system.

### Service Availability

Desktop Service is required along with Network/Intranet for access to other services. Required availability for these services is 99.5 percent uptime not counting planned maintenance times. The 99.5 percent availability metric will be measured by a rolling 6-month period.

### Reliability

The service is guaranteed not to break more than three times per year. A break is defined as the loss of access to a vital business function.

### Service Performance

Designed for high performance, the desktop should not keep the user waiting for response to an input for more than two minutes out of any five-minute window. Any failures must be reported to the Service Desk for incident resolution.

### Change Management Procedures

Any proposed change by the Customer must be submitted through the Service Desk for review. A notice of acceptance/denial and reason for such must be within five business days of the next CAB meeting for Normal changes or three days for Standard changes. Emergency changes will be dealt with immediately by the Service Desk Manager.

### Service Reviews

Reviews of the service will be conducted by the Service Level Management in conjunction with the Customer at least annually/as well as after a major outage or change.

A photograph showing a group of business professionals in a conference room. A man in a dark suit is gesturing with his hands while speaking. Other people are seated around the table, listening attentively. The room has large windows in the background.

Always aim to reach an  
agreement during  
**negotiations.**

# Negotiation Strategy

Procurement manager drives negotiations for the exact parameters of a contract.

Project manager and project teams engage in negotiations.

**Agile** - Exact deliverables will vary as the customer modifies, adds, and reprioritizes items in the product backlog. Therefore, define clearly delineated ways to ensure agreed performance levels.

**Traditional** – An important objective clearly designates the project's intended deliverables and how they will be measured and compensated.



# Negotiations

Documents used either in reaching an agreement or produced as the result of an agreement:

- ✓ A statement of work or major deliverables
- ✓ A schedule with milestones and dates
- ✓ Performance reporting expectations
- ✓ Pricing and payment terms
- ✓ Inspection, quality requirements, and acceptance criteria
- ✓ Warranty and future support
- ✓ Incentives or penalties
- ✓ Insurance and performance bonds
- ✓ Subcontractor approvals
- ✓ Terms and conditions
- ✓ Change request handling
- ✓ Termination clauses and dispute resolution



# Performance Reports



- ✓ Percentage of work completed
- ✓ Quality and technical performance metrics
- ✓ Start and finish of scheduled activities
- ✓ Change requests
- ✓ Defects
- ✓ Actual costs and durations



Work performance data is integrated and contextualized to:

- ✓ Generate decisions
- ✓ Raise issues, actions, and awareness



Agile projects, include:

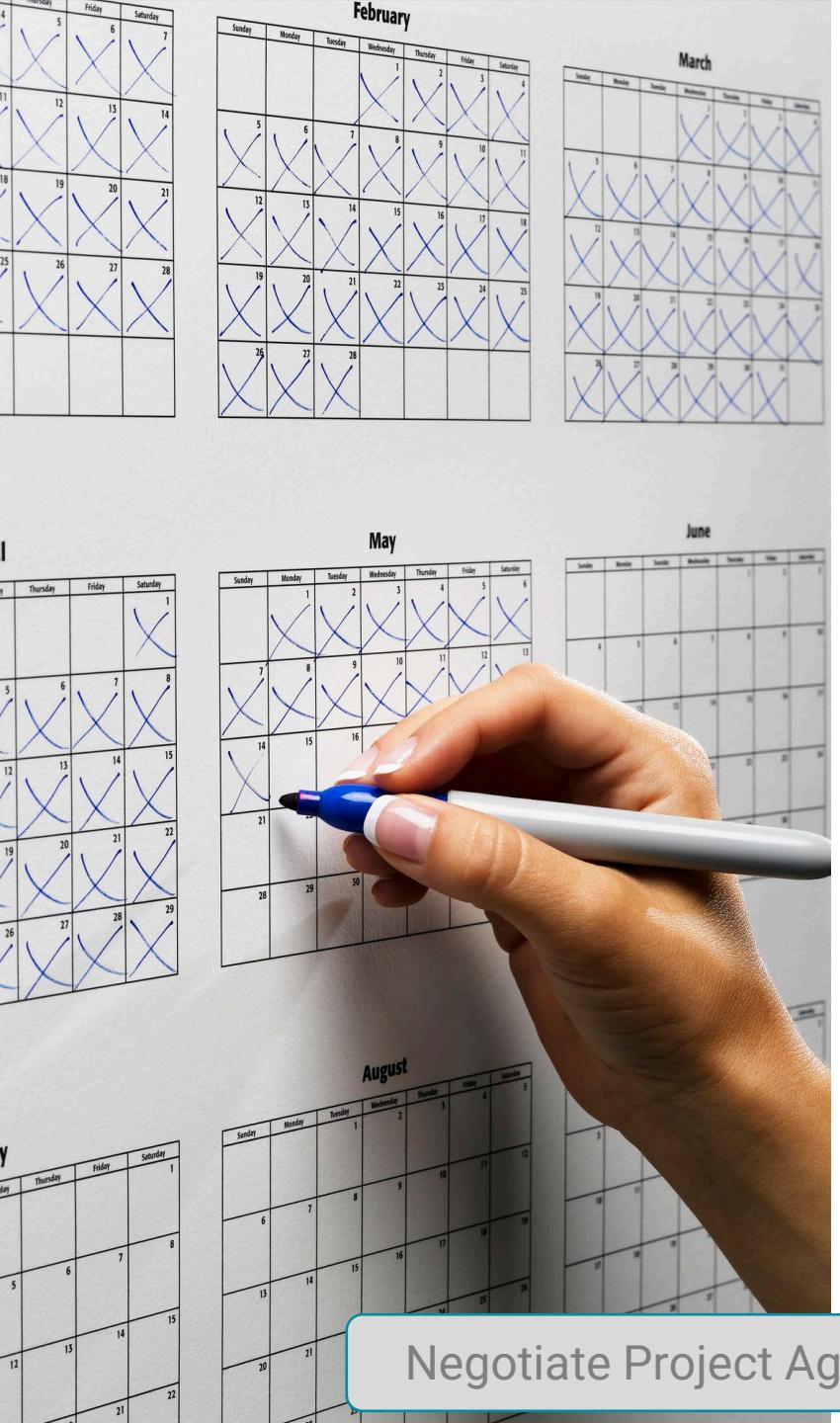
- ✓ Completed and accepted stories
- ✓ Product backlog progress
- ✓ Comparison of stories delivered and iteration plans

# Experts

Experts who can provide judgment include:

- ✓ People from other areas of the organization
- ✓ Consultants
- ✓ Stakeholders
- ✓ Professional and technical associations





# Resource Calendars

Determine **available resources** (people, equipment, material, etc.) during a planned activity period.

Use when **estimating project activities**.

Identify key resource attributes (skills and experience levels) to ensure that **appropriate and required resources will be available** for different aspects of the project.

Course: Building and Training the Project Team (2021 Update)  
Video: Resource Estimates (4:38 run time)

More  
about...

## Resource Estimates





Review team performance and identify lessons learned regularly

# Lessons Learned

Identify specific improvements that will **improve the team's overall efficiency and effectiveness.**

**Agile** teams hold a **retrospective** at the end of each iteration to identify potential issues, identify potential solutions, and improve the processes the team uses to improve its overall performance.





# Special Intervals

Projects may require scheduled “down” time from work for various reasons. Negotiate how and when these will take place according to project and team needs.

For example:

**Black-Out** times when deliverables are handed over for implementation.

- ✓ Suspends changes
- ✓ Reduces risks as the solution is released to customers
- ✓ May be negotiated in advance based on the overall project schedule and timeline.

“Go Live” occurs at the end of the project timeline.

**Agile** – Uses iterations, or numerous releases of aspects of the solution over the project's timeline, and black-out times, if needed, will be negotiated as the project approaches a release threshold.



# Empower Team Members and Stakeholders

TOPIC D

# Deliverables and Tools



Decisions

Estimates



Team decision-making tools

Brainstorming

Fist of Five

Roman voting

Polling

Planning poker

Dot voting

Retrospective

Empower  
Team  
Members  
LESSON 1  
TOPIC D

# Team Strengths

When forming teams, it's critical to understand the skills and competencies needed to perform project work and produce deliverables.

Identify team strengths and weaknesses to **organize around team strengths**.

As teams progress, leverage team members' skills to improve team performance.





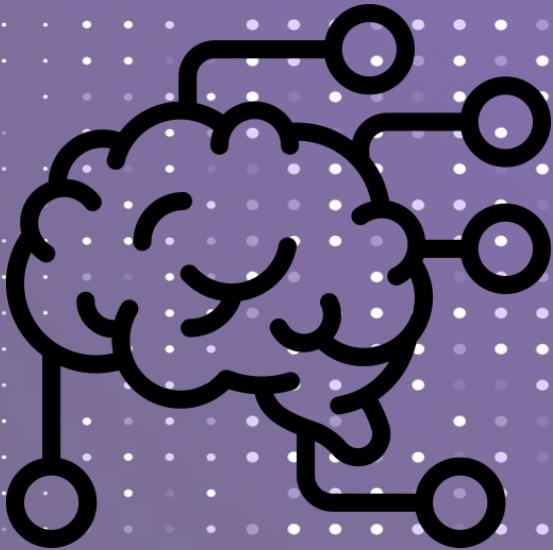
# Team Decision-Making Tools

Deciding how you will work together is important. While the Team Charter addresses decision-making and conflict resolution criteria, the **team will establish their own norms**.

For example, seeking consensus may be highly desirable, but decide how to respond when consensus can't be reached.

The team can decide in advance to take the highest estimate in case of persistent disagreements.

Any project team should establish its own **Way of Working (WoW)**.



# Brainstorming

An **ideation technique** for teams.

A facilitator works with the team to identify potential solutions to a given problem.

Team performs various types of analysis to select the most appropriate alternatives.

Empower  
Team  
Members  
LESSON 1  
TOPIC D

# Estimates

People doing the work should be estimating tasks because they know:

- ✓ the risks
- ✓ the level of effort
- ✓ the potential pitfalls

**Traditional** - Use hours of effort.

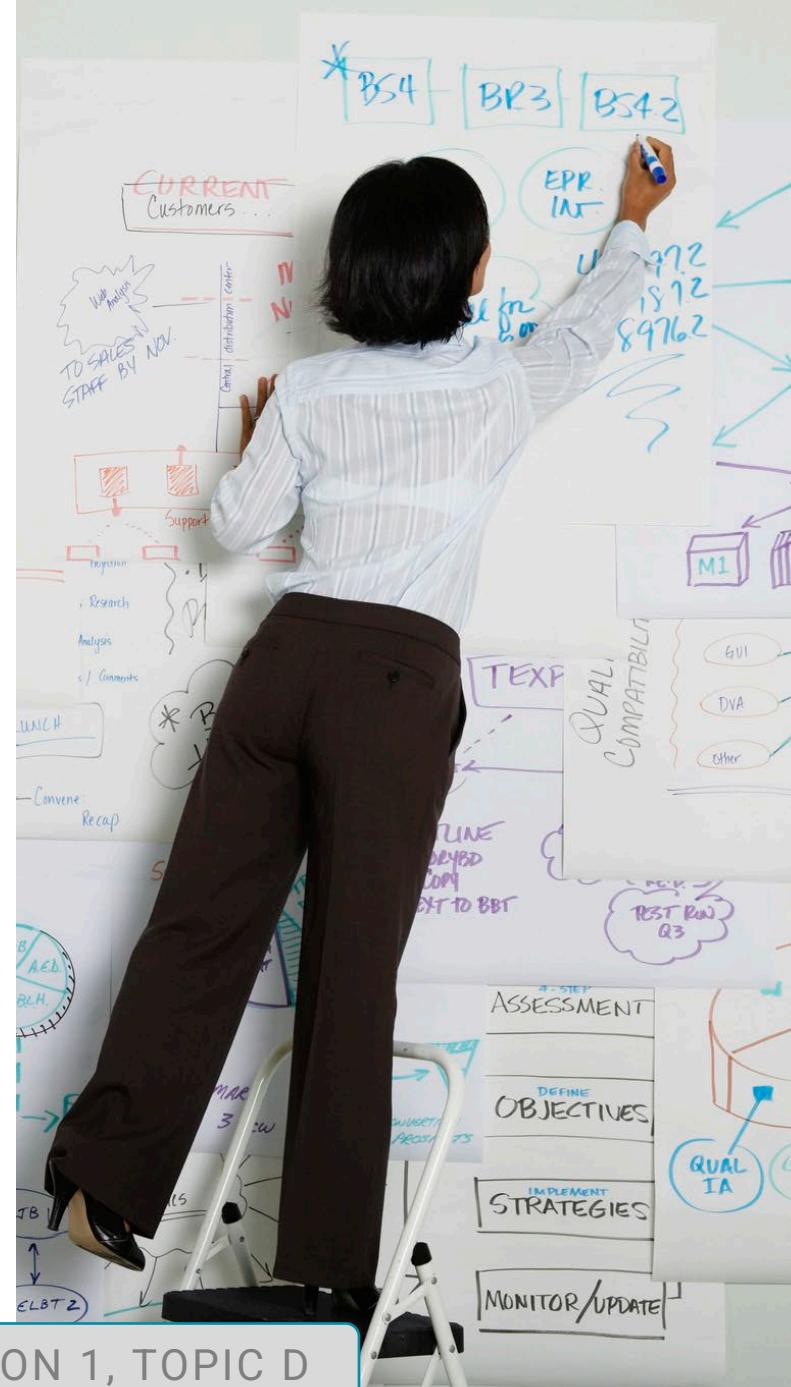
- ✓ Three-point estimating asks the estimators to provide the most likely (tM); optimistic (tO); and pessimistic (tP) estimates then divide by three:

$$tE = (tO + tM + tP) / 3$$

- ✓ Other methods include analogous, parametric, bottom-up estimating

**Agile** - Avoid using absolute time estimates.

Story Point technique uses points, not time units, to estimate the difficulty of implementing a user story. It's an abstract measure of effort required to implement work.



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

Video: Three-point Estimating (6:34 run time)

Watch from Start to 3:20

More  
about...

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## Three-point Estimating



# Team Task Accountability

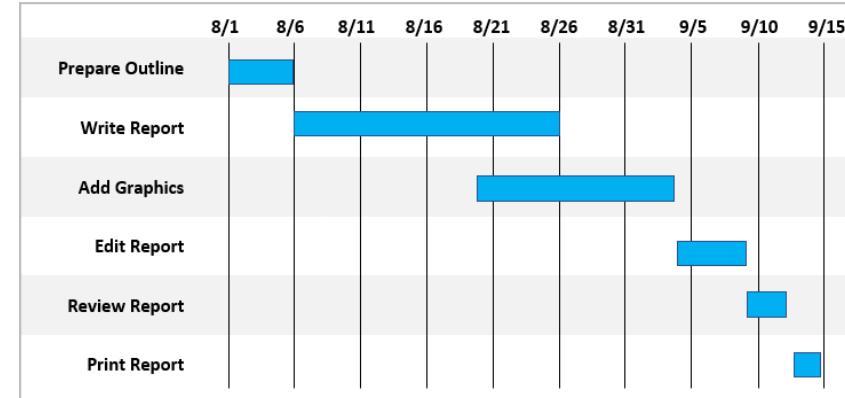
Encourage team members to self-organize in determining:

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

Use Gantt charts and Kanban boards to promote visibility and collaboration.

**Agile** - Team commits to performing work in an iteration.

Empower  
Team  
Members  
LESSON 1  
TOPIC D



Gantt Chart



Kanban Board

## GUIDELINES

# Evaluate Demonstration of Task Accountability

- Determine how to track and manage task accountability.
- Use a Work Breakdown Structure (WBS) to identify the tasks needed to produce the deliverables.
- Identify, track, and manage relevant tasks and assignees with a WBS dictionary (or work package).
- Agile – The team handles task identification and tracking as part of iteration planning.

Empower  
Team  
Members  
LESSON 1  
TOPIC D



## GUIDELINES

# Determine and Bestow Levels of Decision-Making Authority

- Team members should identify, plan, and manage tasks
- Teams performing work should also perform estimates for the work
- Empower teams to drive their own improvement

Empower  
Team  
Members  
LESSON 1  
TOPIC D



# BOOTCAMP DAILY 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!**

A desk lamp with a warm, glowing light is positioned on the left side of the frame, casting a bright beam of light onto a dark, textured surface. The lamp's base and the edge of its shade are visible against the dark background. The overall mood is focused and intimate.

# Additional Resources

# MASTERY BUILDER

What are some techniques that a project manager can use to appraise the skills of a potential team member? (Choose two.)

- Ability tests
- Focus groups
- Kanban boards
- RACI matrix

Creating a  
high  
performing  
team



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# MASTERY BUILDER

What does it mean if you are identified as an “R” in a RACI chart?

- You are accountable for the result.
- You should be engaged to provide needed inputs.
- You should be kept up to date on the status.
- You are responsible for the activity's execution.

Creating a  
high  
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Creating a  
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# MASTERY BUILDER

Which of the following are components of a Resource Calendar?  
(Choose two.)

- Working days
- Training strategies
- Availability of physical resources
- Recognition plans

Creating a  
high  
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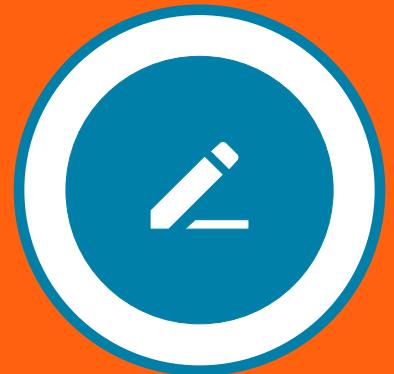


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# MASTERY BUILDER

Which of the following are part of an effective team charter?  
(Choose two.)

- Shared values
- Project objectives
- Resource assignments
- Conflict resolution

Creating a  
high  
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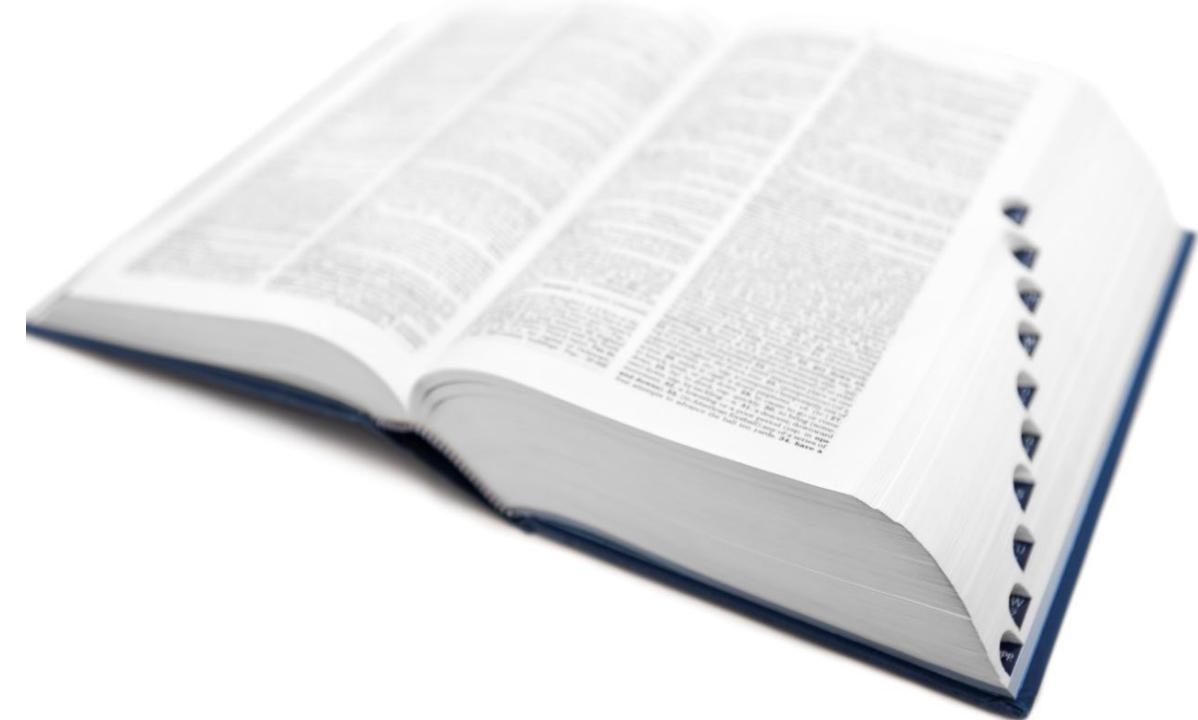
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Creating a  
high  
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team



# **VOCABULARY**

## FROM TODAY'S SESSION



# Project Team



## DEFINITION

A set of individuals who support the project manager in performing the work of the project to achieve its objectives.

# Stakeholder



## DEFINITION

An individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project, programs, or portfolio.

# Stakeholder Register



## DEFINITION

A list of individuals or organizations who are actively involved in the project, whose interests may be negatively or positively affected by the performance or completion of the project and whose needs or expectations need to be considered.

# RACI Chart



## DEFINITION

A common type of responsibility assignment matrix (RAM)

Responsible, Accountable, Consulted, and Informed statuses define the involvement of stakeholders in project activities.

# Resource Management Plan



## DEFINITION

The project document that identifies resources and how to acquire, allocate, monitor, and control them.

# Team Charter



DEFINITION

A document that enables the team to establish its values, agreements, and practices as it performs its work together.

# Ground Rules



## DEFINITION

As defined in the team charter, clear expectations set, regarding the code of conduct for team members.

# Expert Judgment



## DEFINITION

Judgment based upon expertise in an application area, knowledge area, discipline, industry, etc., as appropriate for the activity being performed. Such expertise may be provided by any group or person with specialized education, knowledge, skill, experience, or training.

# Resource Calendars



DEFINITION

Identify working days, shifts, and when specific resources are made available to the project.

# Lessons Learned Register



## DEFINITION

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