



# **PMP® EXAM PREP**

## PMI Authorized Training Partner

### **BOOTCAMP**

### **Session 5**

**Class will begin at 1pm EST**

**Attendance Alert**

**Please make sure you log into Zoom with your correct first name and last name and enter the same information for every session.**

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

### **PMP® Exam Prep**

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

# HOUSEKEEPING



## Resources & Materials

This class will be recorded for quality assurance purposes.

SharePoint Student Document [Link](#):

From Edward to Everyone:  
Welcome to today

From Edward to Everyone:  
Welcome to today

From Me to Everyone:  
Looking forward to today's tutorial!

From Edward to Everyone:  
How did everyone find the seminar last week?

To:  Everyone (in Meeting) File ...

Type:

Documents > PMP (PMI ATP) Bootcamp

	Name
	Attendance and Certificates of Completion Info Video
	Bootcamp Slide Decks and Recordings
	Documents (Syllabus, Exam Content Outline, etc.)
	PMP Learner Kit Information Video

# Your PMP Bootcamp Course Syllabus

## (Mapped to the PMP Student Manual)

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

# Recap Session 04

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

Class will begin at:  
Start Date: 03/21/2024  
End Date: 03/22/2024

**PMP® Exam Prep**  
PMP® Exam Prep is designed to help you pass the PMP® exam on your first attempt. It includes:  
• A comprehensive study guide with over 1,000 questions and answers.  
• A detailed study plan to help you prepare effectively.  
• Access to our online forum where you can ask questions and get answers from experienced project managers.  
• A free trial of our PMP® Exam Prep software.

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

Week	Topic	Activities
Week 1	Introduction to Project Management	Class Introduction, Project Management Overview, Project Phases
Week 2	Scope Management	Scope Definition, Scope Change Control, Scope Verification
Week 3	Time Management	Activity Scheduling, Activity Duration Estimation, Resource Allocation
Week 4	Budget Management	Budget Planning, Budget Monitoring, Cost Control
Week 5	Risk Management	Risk Identification, Risk Analysis, Risk Response Planning
Week 6	Quality Management	Quality Planning, Quality Control, Quality Assurance
Week 7	Communication Management	Communication Planning, Stakeholder Identification, Stakeholder Engagement
Week 8	Procurement Management	Procurement Planning, Procurement Contracting, Procurement Performance Monitoring
Week 9	Team Management	Team Selection, Team Development, Team Motivation
Week 10	Project Integration Management	Project Integration Planning, Project Integration Monitoring and Controlling
Week 11	Project Management Tools	Project Management Tools Overview, Microsoft Project, Gantt Charts, Network Diagrams
Week 12	Project Management Best Practices	Best Practices in Project Management, Case Studies, Group Discussion
Week 13	Final Project Review and Preparation	Project Review, Final Project Report, Preparation for PMP® Exam

**Recap Session 03**

**Plan and Manage Procurement**

**Deliverables and Tools**

- Universal Work Procurement Management Plan
- Procurement Contracts
- Change Control Log
- Procurement Techniques
- Procurement Stakeholders
- Procurement Risks

**Procurement Strategy**

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

**Delivery Solution**

The goal is to ensure the delivery of procurement solutions by the regular vendor or organization.

**Make or Buy?**

Make or buy analysis - The process of determining whether to manufacture or purchase a component or product.

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

Make or buy analysis - The process of determining whether to manufacture or purchase a component or product.

Make or buy analysis - The process of determining whether to manufacture or purchase a component or product.

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**More about...**

Contract Types (2023 Updated) - Value Statement or Value Design (2023 rev 006)

**Make-or-Buy Analysis**

**Procurement SOW**

The Statement of Work (SOW) is a formal document that defines the scope of work for a procurement project. It outlines the requirements, responsibilities, and deliverables for the vendor or provider to complete the project.

**Procurement Management Plan**

The Procurement Management Plan is a document that defines the processes and procedures for managing procurement activities. It includes the scope of procurement, procurement strategy, procurement methods, and procurement risks.

**Source Selection Criteria**

Criteria for selecting providers:

- Understanding of needs and requirements
- Technical capability
- Financial stability
- Experience and reputation
- Ability to meet delivery dates
- Performance history
- Financial stability
- Intellectual property rights
- Confidentiality

**Qualified Vendors**

Vendors approach the bid process differently based on their experience and capabilities. Some may submit a general proposal, while others may provide a detailed technical proposal.

**Bidder Conferences**

Bidders are invited to a bidder conference to discuss the procurement requirements and answer any questions they may have. This helps to clarify the requirements and reduce misunderstandings.

**External Resources Requirements and Needs**

External resources are required for the procurement process. These may include legal, financial, and technical experts.

**Supplier and Contractors**

Supplier and contractor management involves identifying potential suppliers and contractors, evaluating their qualifications, and managing their performance.

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**Communicating with Suppliers and Vendors**

Communication with suppliers and vendors is crucial for the success of the procurement process. It involves:

- Establishing communication channels
- Setting clear expectations
- Maintaining transparency
- Addressing issues promptly
- Ensuring timely delivery

**Components of Contracts**

- Definition of work to be performed
- Delivery date and milestones
- Scope of work and deliverables
- Financial terms and payment schedule
- Responsibilities of both parties
- Termination clauses
- Intellectual property rights
- Confidentiality

**Traditional Contract Types**

Type	Description
Fixed Price Contract	Contract price is fixed and does not change even if the cost of materials or labor increases.
Cost Plus Contract	Contract price is based on the cost of materials and labor plus a fixed fee for profit.
Time and Material Contract	Contract price is based on the time spent and the cost of materials.
Performance Contract	Contract price is based on the quality of the work produced.

**Agile Contract Types**

Type	Description
Scrum Contract	Contract price is based on the number of sprints completed.
Kanban Contract	Contract price is based on the number of tasks completed.
Iterative Contract	Contract price is based on the number of iterations completed.

**More about...**

Contract Types and Procurement Considerations

**Contract Change Control System**

The purpose of a contract change control system is to manage changes to the contract. It includes:

- Identifying the need for a change
- Requesting a change
- Reviewing the change request
- Specifying the changes required
- Documenting the changes
- Controlling the changes

**Types of Contract Changes**

Type	Description
Administrative Changes	Changes that do not affect the scope or cost of the project.
Functional Changes	Changes that affect the scope or cost of the project.
Financial Changes	Changes that affect the financial aspects of the project.

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**Legal Concepts when Managing Disputes**

Legal concepts when managing disputes include:

- Dispute resolution
- Mediation
- Arbitration
- Litigation

**Handle Disputes**

- Identify the nature of the dispute
- Conduct a thorough investigation
- Identify the relevant laws and regulations
- Identify the parties involved
- Identify the dispute resolution process
- Identify the legal options available
- Identify the best course of action

**Manage Suppliers and Contracts**

- Define roles and responsibilities for procurement
- Establish a procurement plan
- Identify procurement requirements
- Identify procurement methods
- Identify procurement risks
- Identify procurement stakeholders

**Establish Project Governance Structures**

**Deliverables and Tools**

- Stakeholder Analysis
- Organizational Process Assets
- Stakeholder Management Plan

**Project Governance**

Project governance is the process of establishing and maintaining the framework for decision-making and accountability in a project. It includes:

- Defining roles and responsibilities
- Establishing reporting relationships
- Establishing decision-making processes
- Establishing conflict resolution mechanisms
- Establishing risk management processes
- Establishing communication processes
- Establishing performance measurement and reporting processes

**Project Phases**

Project phases are distinct periods of a project, each with its own objectives and activities.

**Apply Governance to the Project Life Cycle**

Applying governance to the project life cycle involves:

- Defining the project scope and objectives
- Establishing roles and responsibilities
- Establishing communication channels
- Establishing risk management processes
- Establishing performance measurement and reporting processes

**Phase Gates**

Phase gates are checkpoints in the project life cycle that determine whether the project can proceed to the next phase. They are used to ensure that the project is progressing as planned and that the deliverables meet the specified requirements.

**Phase-to-Phase Handover**

Phase-to-phase handover is the process of transitioning from one project phase to the next. It involves:

- Establishing clear handover criteria
- Establishing communication channels
- Establishing risk management processes
- Establishing performance measurement and reporting processes

**More about...**

Characteristics of Project Phases

**Determine Appropriate Governance for a Project**

- Understand the organization's structure and culture
- Define the required governance structure
- Establish roles and responsibilities
- Establish reporting relationships
- Establish decision-making processes
- Establish conflict resolution mechanisms
- Establish risk management processes
- Establish communication processes
- Establish performance measurement and reporting processes

**Plan and Manage Project/Phase Closure**

**Deliverables and Tools**

- Definition of Close Deliverables
- Stakeholder Analysis

**Close Project or Phase**

Project closure is the final stage of a project, where all deliverables are delivered and the project is officially closed.

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# Manage Communications

TOPIC C

# Deliverables and Tools

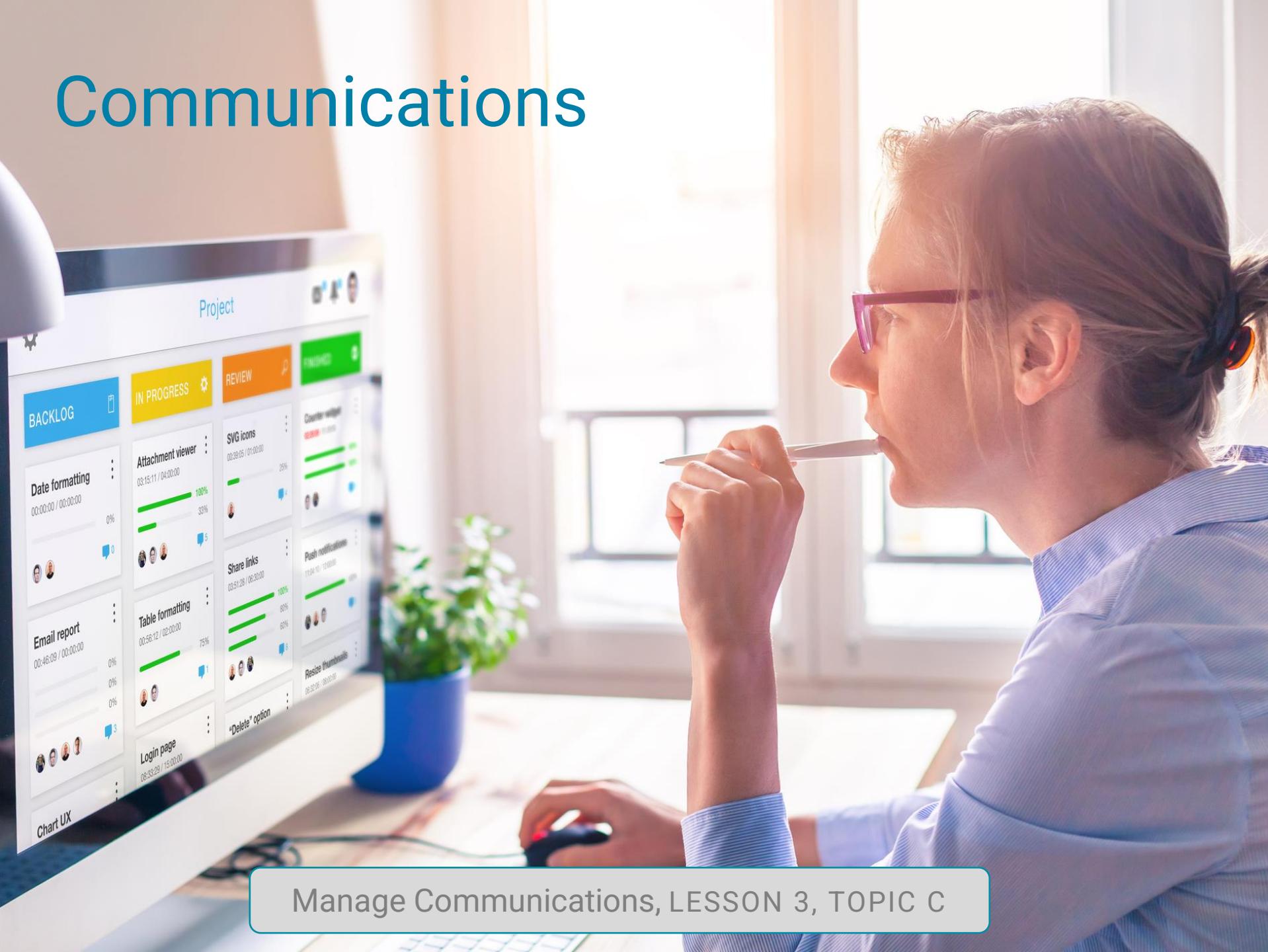


Communications Management Plan  
Project Communications  
Stakeholder Register  
Work performance and change updates



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

# Communications

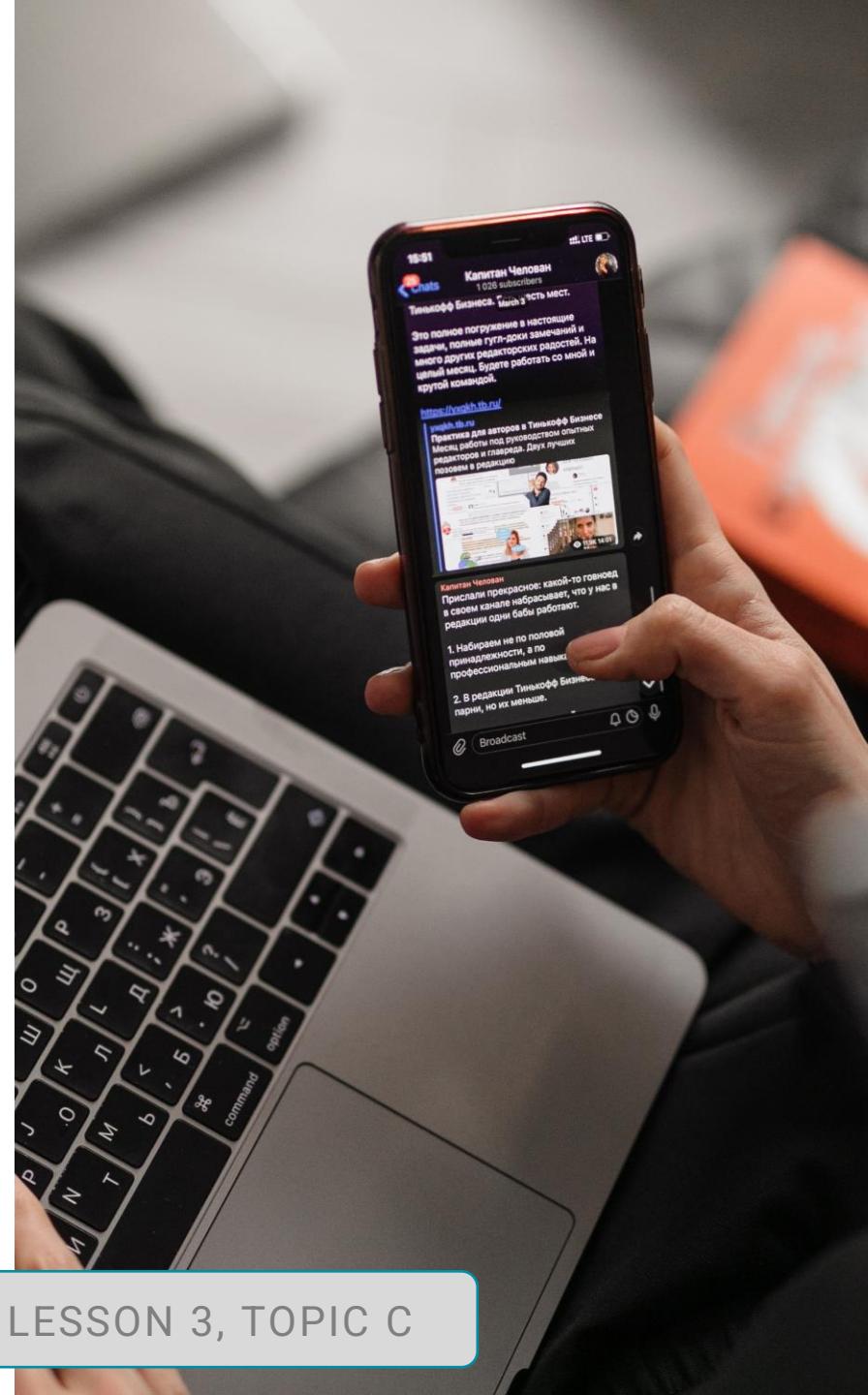


Manage Communications, LESSON 3, TOPIC C

# Project Communications

Consider these dimensions:

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



# Spotlight: Communication Channels

# Communications Management Plan Example

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

Manage Communications,  
LESSON 3, TOPIC C

# Communications Management Plan - Components

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

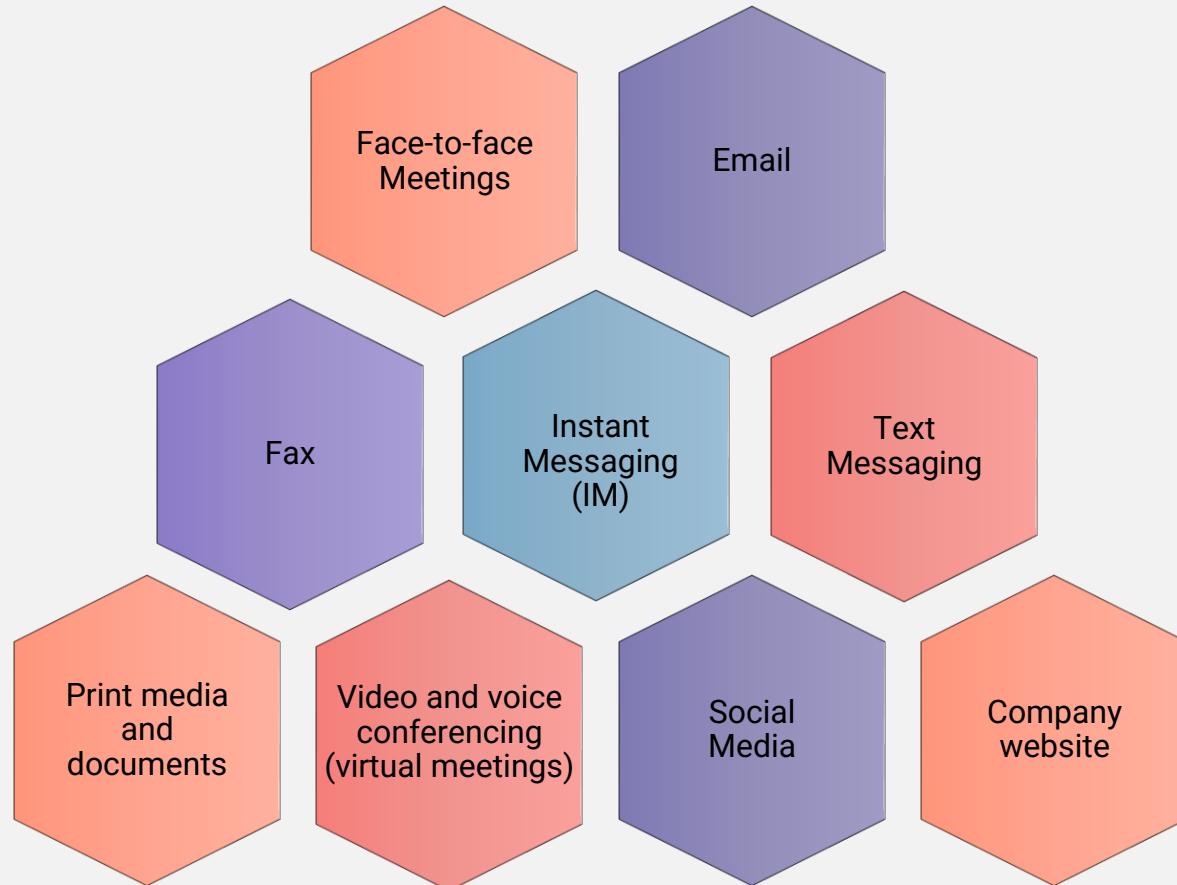




# Communication Requirements Analysis

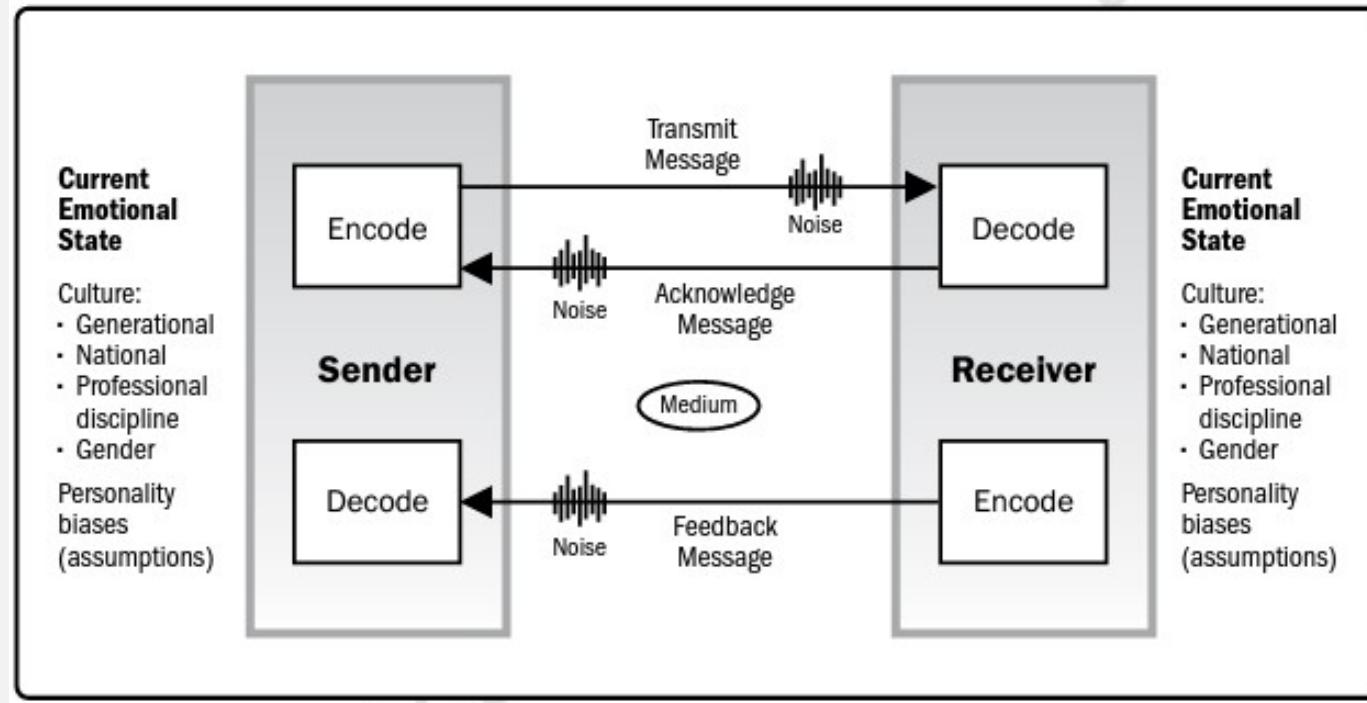
- ✓ Leads to a clear articulation of the **stakeholders' communications needs**.
- ✓ Enables **effective choices** regarding the technologies to be recommended.
- ✓ Takes the form of a **grid, questionnaire** or **survey** that documents the communications and technology requirements for each stakeholder.

# Communication Types



# Spotlight: Project Status Reports

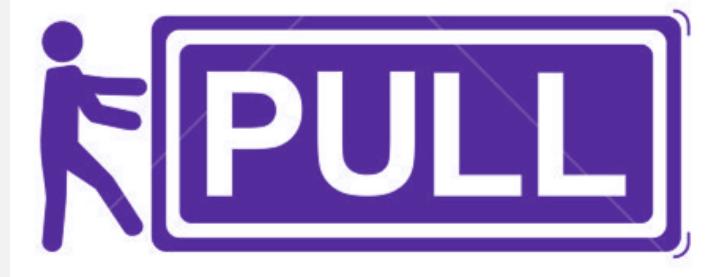
# Communication Model



## Sender-Receiver Model



# Communication Methods



Interactive

# Feedback

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



Manage Communications, LESSON 3, TOPIC C

## GUIDELINES

# Effectively Manage Communication

Manage  
Communication  
s, LESSON 3,  
TOPIC C

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





# Engage Stakeholders

TOPIC D

# Deliverables and Tools



Stakeholder Register

Stakeholder Engagement Plan

Work performance information  
assessment



Organizational Process Assets

Expert judgment

Meetings

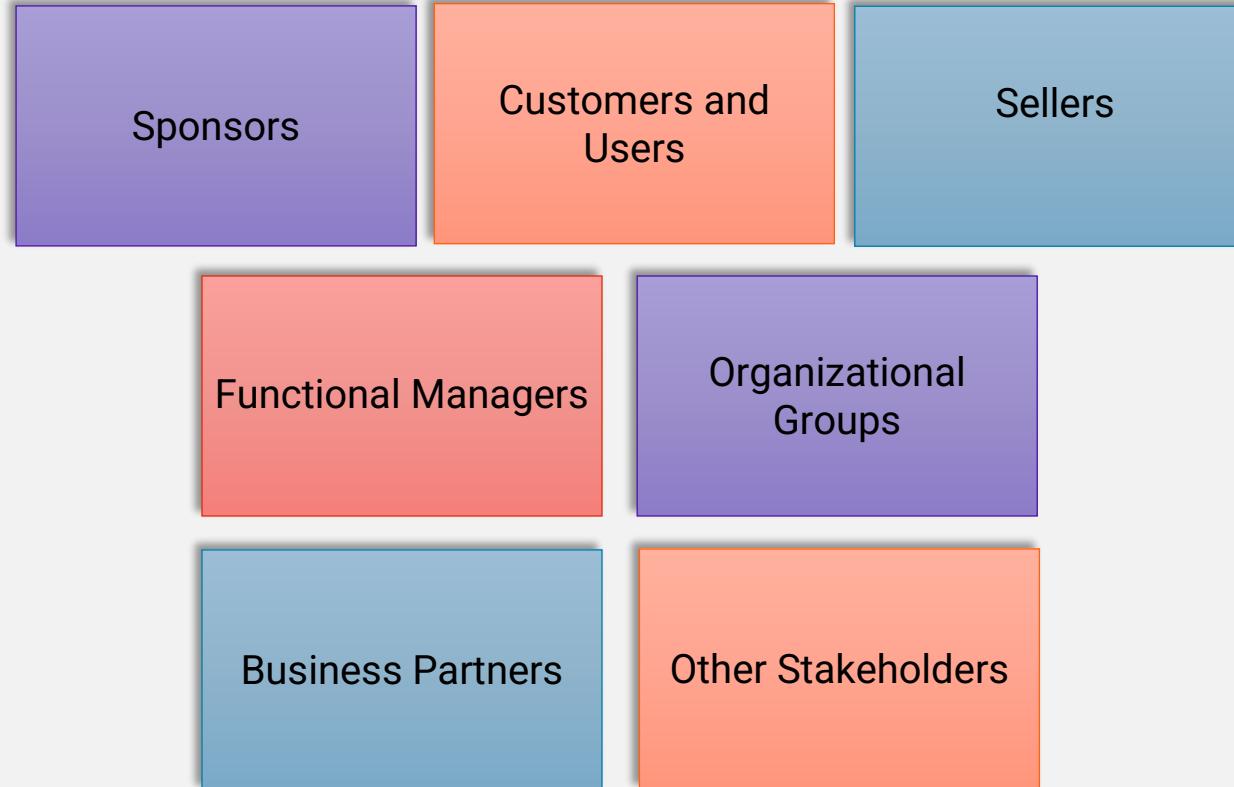
Power or Influence vs. Impact Grid

Interpersonal skills

Management skills

Stakeholder Register

# Stakeholder Categories



# Stakeholder Register

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



# Stakeholder Engagement Strategy



Engage Stakeholders, LESSON 3, TOPIC D

# Stakeholder Engagement Assessment Matrix - Example

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

C = Current engagement level

D = Desired engagement level

## GUIDELINES

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

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

Engage  
Stakeholders,  
LESSON 3, TOPIC  
D





# Create Project Artifacts

TOPIC E

# Deliverables and Tools



No specific deliverables



No specific tools

# Artifacts vs. Deliverables and Project Documents

Create  
Project  
Artifacts,  
LESSON 3,  
TOPIC E

## Artifacts

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

## Project Documents

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

## A Deliverable

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



# Project Artifact



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

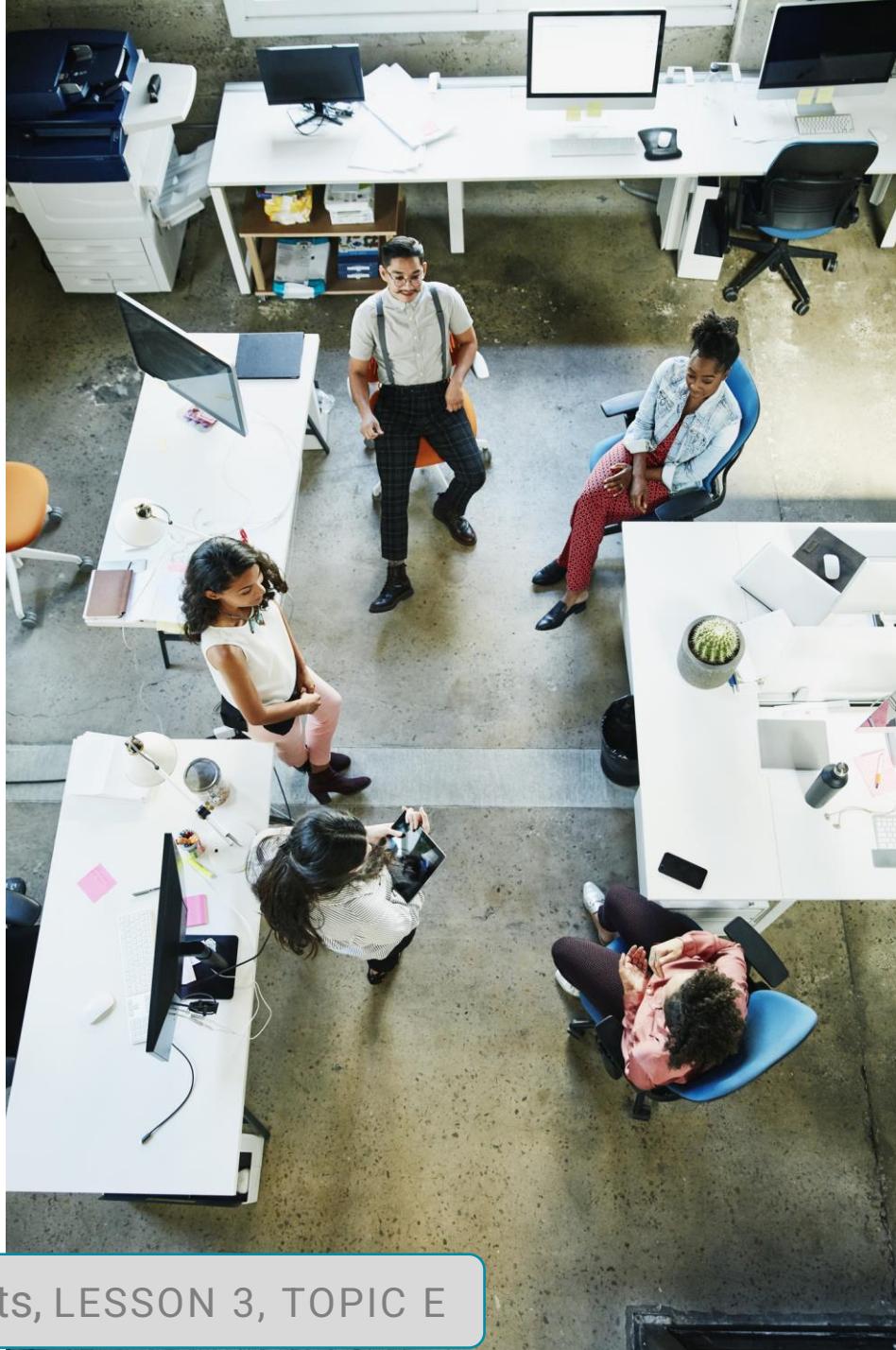


Project teams create and maintain many artifacts during the life of the project.

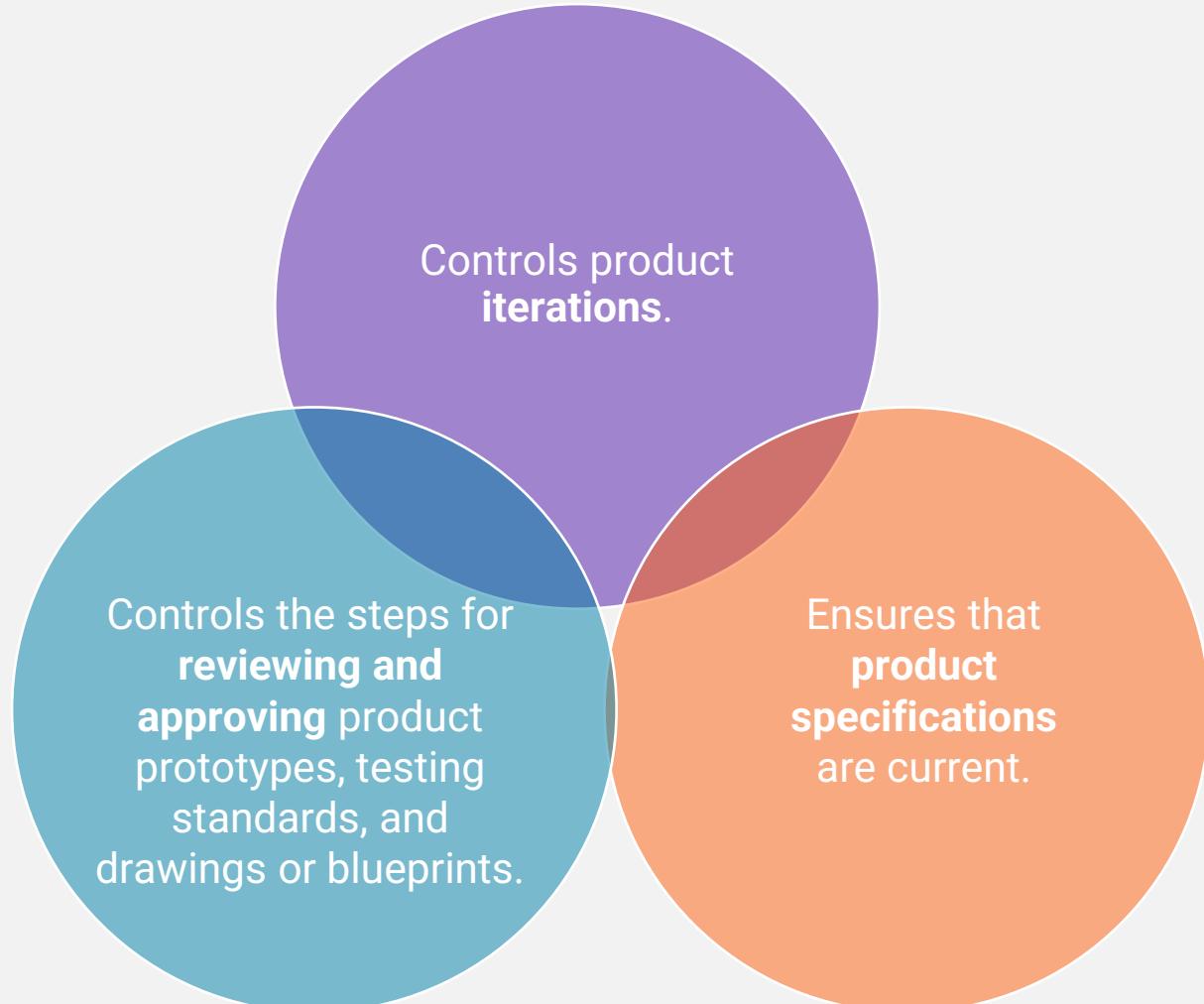
# Project Artifact Examples

Project artifacts might include:

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



# Configuration Management



# Version Control

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





## Storage and Distribution of Artifacts

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

Create  
Project  
Artifacts,  
LESSON 3,  
TOPIC E



# Project Artifact Management

An effective archive management system includes:

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



# Manage Project Changes

TOPIC F

# Deliverables and Tools

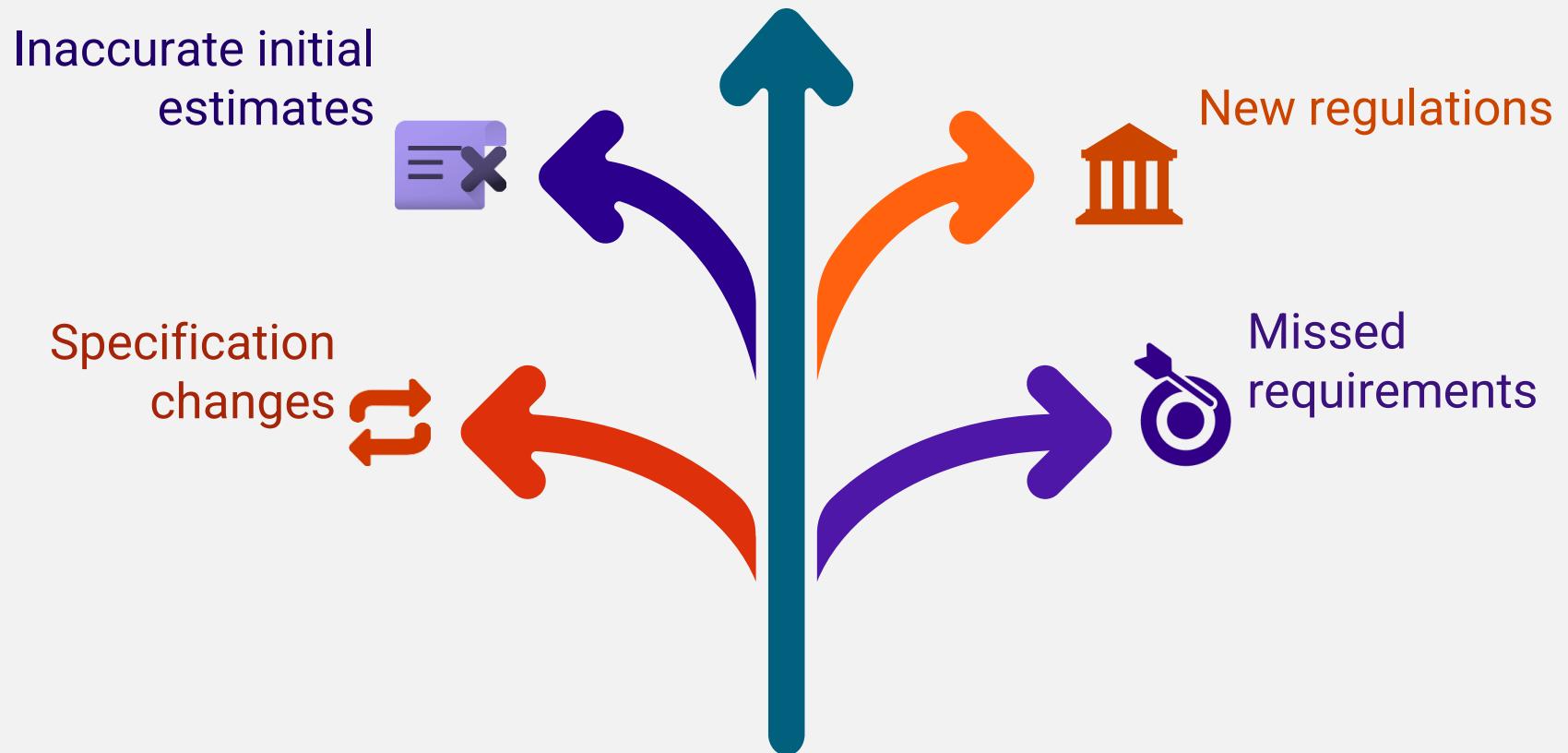


Issues Log  
Risk Register  
Stakeholders Register  
Updated Issues Log

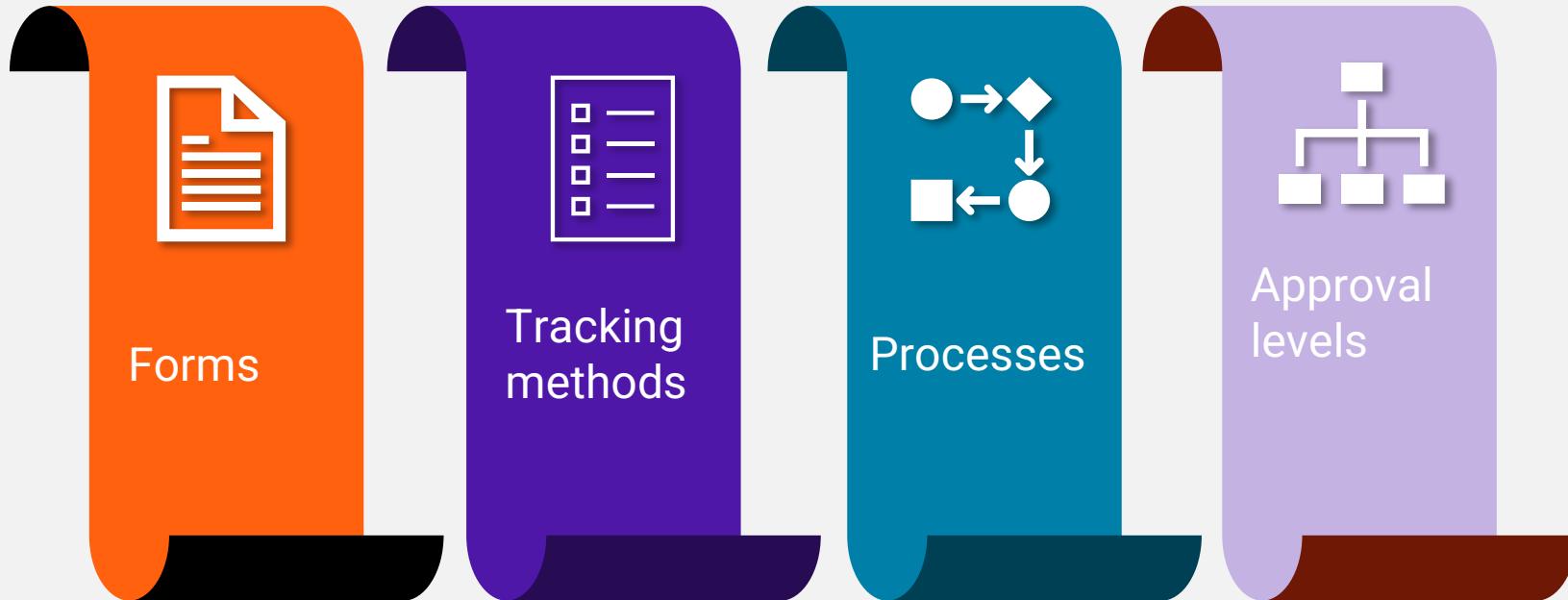


Manage and update Issues Log  
PMIS  
Communicate with stakeholders  
Negotiate with stakeholders

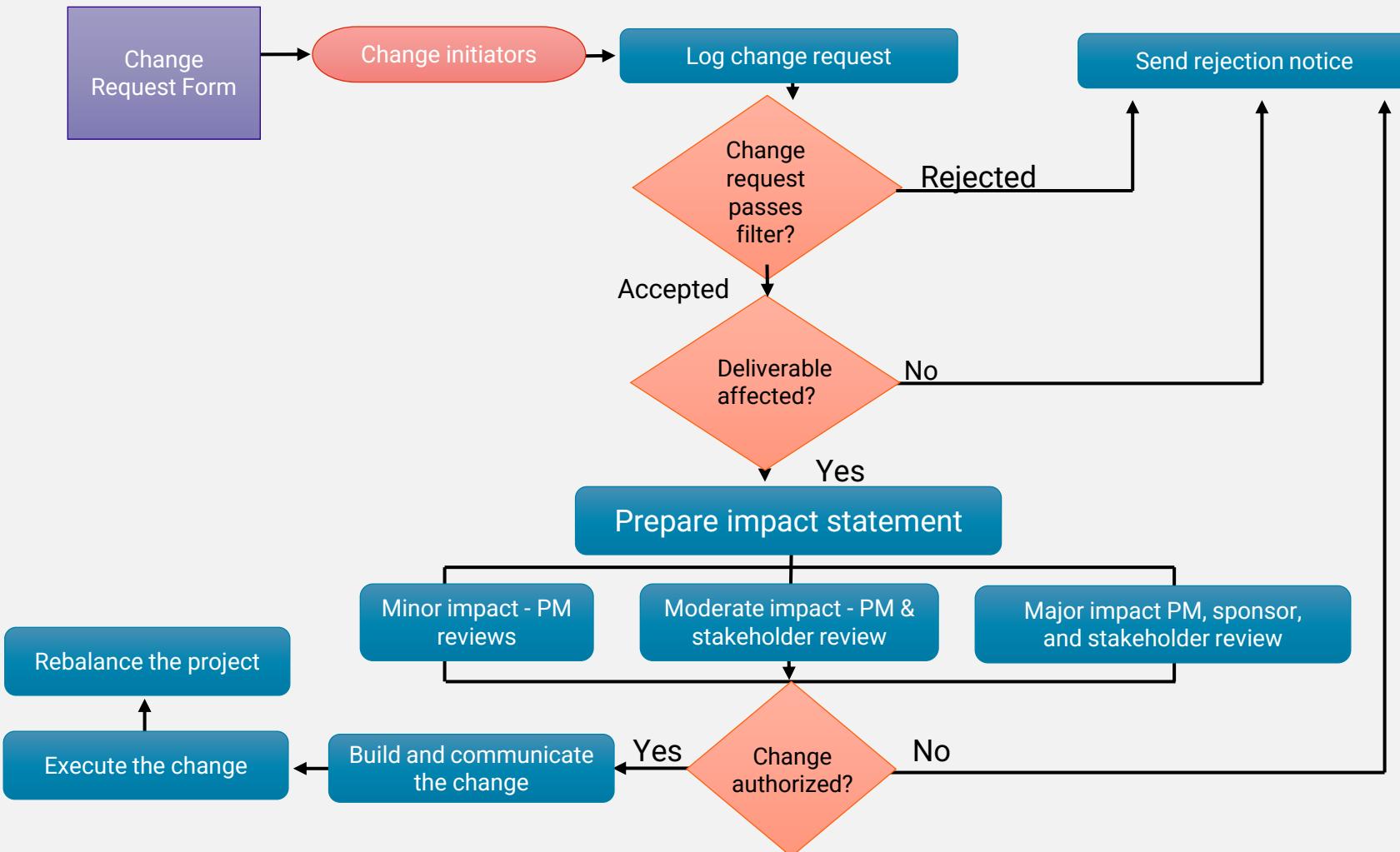
# Causes of Project Changes



# Change Control Systems



# Change Management Process Flowchart



Manage  
Project  
Changes,  
LESSON 3,  
TOPIC F

# Change Requests

Types of change requests:

## Corrective action

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

## Preventive action

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

## Defect repair

Modifies a non-conformance within the project.

## Update

Modifies a project document or plan.



# Manage Project Issues

TOPIC G

DOING THE WORK > MANAGE PROJECT ISSUES

# Deliverables and Tools



Issue log

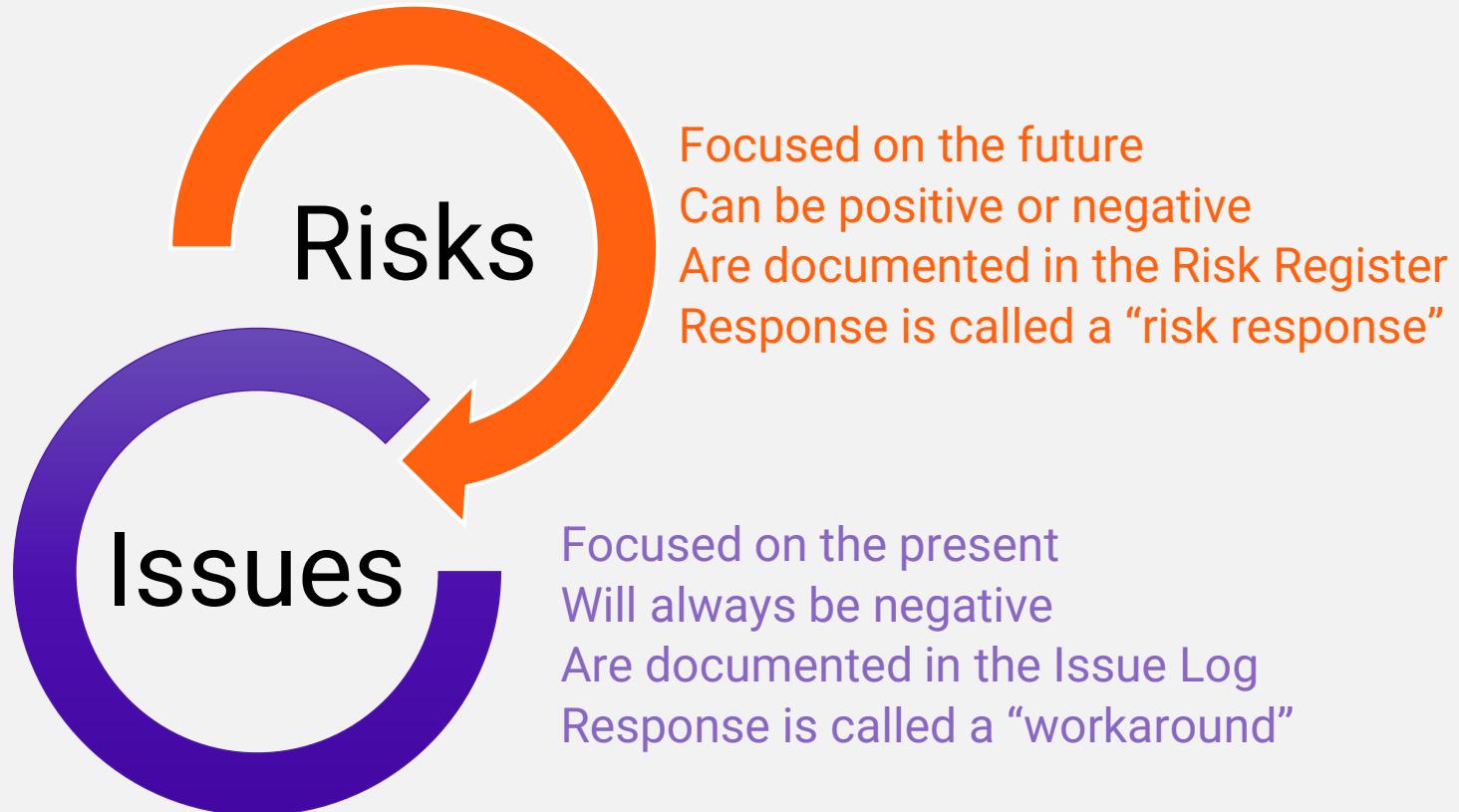


No specific tools

# Issues



# Risks and Issues



# Issue Log

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

Manage  
Project  
Issues,  
LESSON 3,  
TOPIC G



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

# Issue Resolution

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



## GUIDELINES

# Resolving Issues

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

Manage  
Project  
Issues,  
LESSON 3,  
TOPIC G





# Ensure Knowledge Transfer For Project Continuity

TOPIC H

# Deliverables and Tools

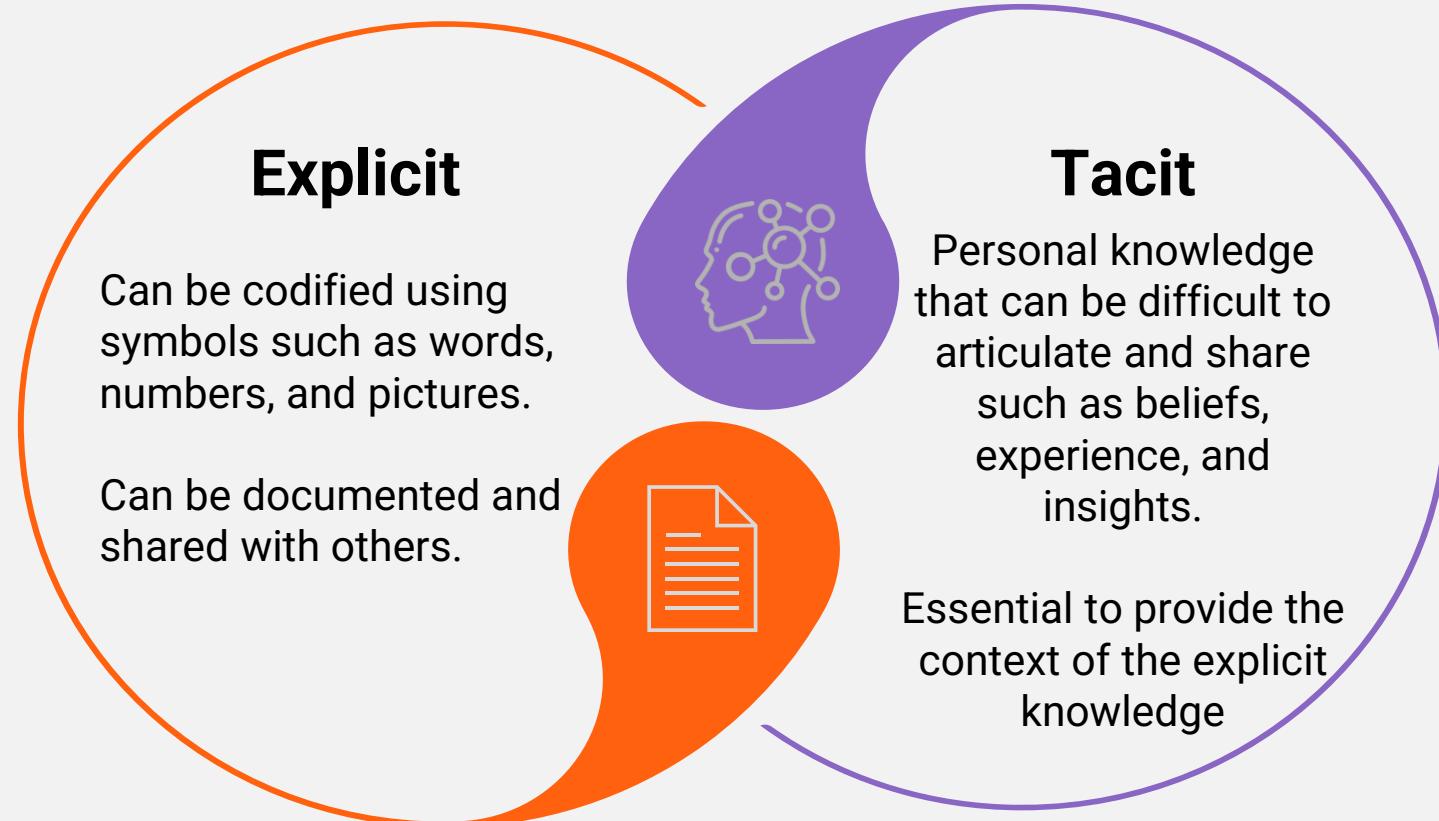


Lessons Learned Register



No specific tools

# Knowledge Types



# Knowledge Management

Level	Description
Individual	<p>Each team member needs to know how to perform their work in accordance with each assigned task's scope, schedule, and cost.</p> <p>Acquire required knowledge by:</p> <ul style="list-style-type: none"><li>• Research</li><li>• Collaboration with team members</li><li>• Examination of the project's or organization's knowledge repository</li></ul>
Project	<ul style="list-style-type: none"><li>• Focus on achieving the goals of the current project.</li><li>• Solicits knowledge about other projects that can be applied to the current project.</li><li>• Project Management Office (PMO) is an excellent source of knowledge, as it exists for the purpose of defining and maintaining standards for project management within an organization.</li></ul>
Organization	<ul style="list-style-type: none"><li>• Focus on managing programs or portfolios.</li><li>• The program manager or portfolio manager seeks information from peers who manage other programs or portfolios, to adapt this knowledge to their specific need.</li></ul>

Ensure  
Knowledge  
Transfer For  
Project  
Continuity,  
LESSON 3,  
TOPIC H

# Lessons Learned

- ✓ Knowledge gained during a project can be useful to subsequent phases of a project and to other projects.
- ✓ Include both **positive** and **negative** experiences that occur throughout the project life cycle.
- ✓ Avoids “**reinventing the wheel**”
- ✓ Long-term learning tool.



Ensure Knowledge Transfer For Project Continuity, LESSON 3, TOPIC H

# Considerations for Lessons Learned

Schedule at the **right time**

Include topics on:

- ✓ Conflict management
- ✓ Vendor relationships
- ✓ Customers
- ✓ Strategy
- ✓ Tactics



Ensure Knowledge Transfer For Project Continuity, LESSON 3, TOPIC H

# Project Responsibilities Within the Team



# Working Environment Expectations

- ✓ Knowledge is not constant, what we knew yesterday can change based on what we did today.
- ✓ Continuously evaluate the project environment for new risks and follow the risk management plan to proactively address them before they become issues that will affect the project objectives.
- ✓ Don't hoard knowledge; follow the communications management plan and inform stakeholders of changes affecting their work.
- ✓ Use appropriate tools to share knowledge with stakeholders:
  - Face-to-face during formal meetings
  - Face-to-face during informal meetings and discussions
  - Telephone
  - Email
  - Wikis
  - Intranet
  - Printed documents





## Knowledge Transfer Approach

Connect individuals, in person or virtually, to share tacit knowledge and collaborate together.



# Knowledge Transfer Techniques

- ✓ Networking
- ✓ Facilitating special interest groups
- ✓ Meetings, seminars, and various other types of in-person and virtual events that encourage people to interact and exchange ideas and knowledge.
- ✓ Training that involves interaction between attendees.
- ✓ Work shadowing and reverse shadowing provide a more individualized method to the exchange of specialized knowledge.

Ensure Knowledge Transfer For Project Continuity, LESSON 3, TOPIC H

## GUIDELINES

# Maintain Team and Knowledge Transfer

- Follow your PMO's guidelines on documenting new knowledge.
- Be alert to new sources of project knowledge and follow the communications management plan to convey that knowledge to stakeholders.
- Proactively seek new knowledge.
- Compile a lessons-learned register throughout the project's lifecycle and add it to a lessons-learned repository with registers from other projects.

Ensure  
Knowledge  
Transfer For  
Project  
Continuity,  
LESSON 3,  
TOPIC H



## LESSON 4

# KEEPING THE TEAM ON TRACK

- Lead a Team
- Support Team Performance
- Address and Remove Impediments, Obstacles, and Blockers
- Manage Conflict
- Collaborate with Stakeholders
- Mentor Relevant Stakeholders
- Apply Emotional Intelligence to Promote Team Performance



Ensure Knowledge Transfer For Project Continuity, LESSON 3, TOPIC H



# Lead a Team

TOPIC A

# Deliverables and Tools



Vision / Mission document  
Charter  
Product box  
Reward and Recognition Plan



Diversity awareness  
Leadership styles  
Influence matrix  
Salience model  
Power grids  
Behavior modeling  
Challenge status quo  
Recognize contributions  
Remove impediments  
Communicate vision

# Leadership

The project manager is the visionary leader for the project.

- ✓ Educate the team and other stakeholders about project value delivery
- ✓ Promote teamwork and collaboration
- ✓ Remove roadblocks

Promote the project's mission and value to inspire the team, keep them focused and feel part of the organization's mission.



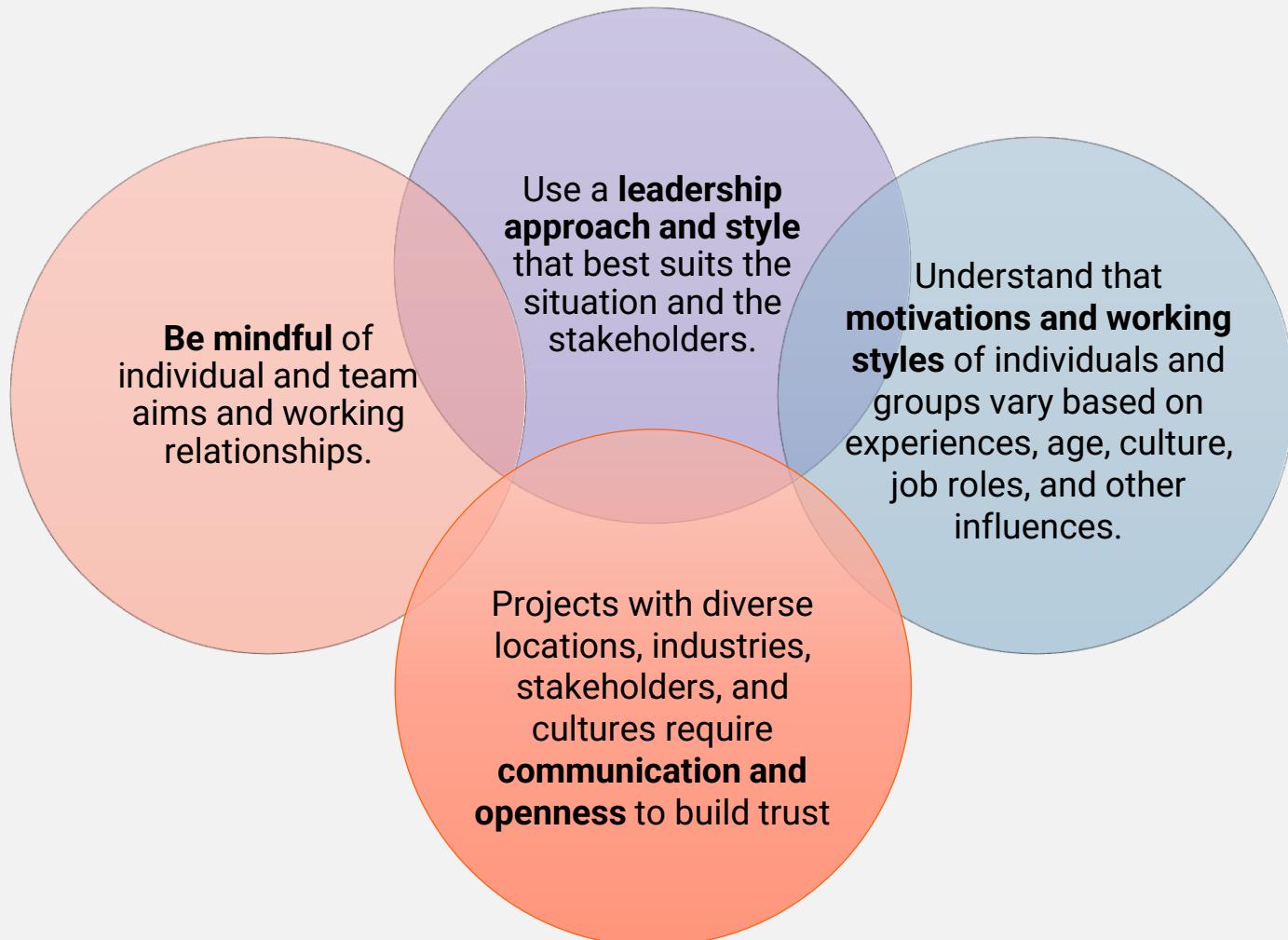


# Leadership Skills

- ✓ Conflict management
- ✓ Cultural awareness
- ✓ Decision making
- ✓ Facilitation
- ✓ Meeting management
- ✓ Negotiation
- ✓ Networking
- ✓ Observation/conversation
- ✓ Servant Leadership
- ✓ Team building

Lead a Team, LESSON 4, TOPIC A

# Diversity Awareness and Cultural Competencies



# Leadership ≠ Management



Lead a Team, LESSON 4, TOPIC A

# Lead and Manage

Let's reflect on two of the project manager's roles to understand the difference.

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

# Leadership Traits



Strong personal ethics, integrity, and trustworthiness



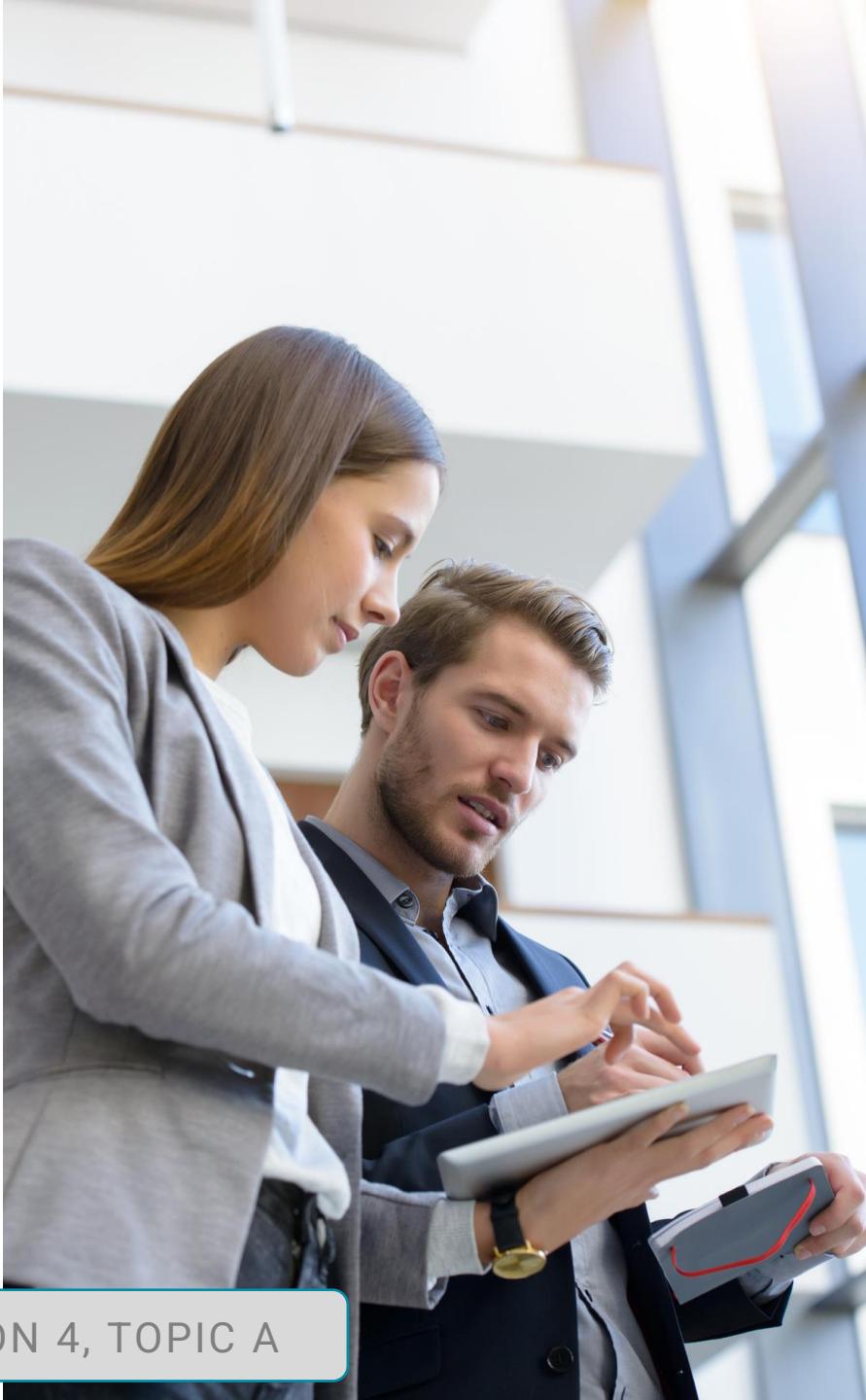
Interpersonal skills (communicator, collaborator, motivator)



Conceptual and analytical skills

# Servant Leadership

- ✓ Facilitate rather than manage
- ✓ Provide coaching and training
- ✓ Remove work impediments
- ✓ Focus on accomplishments



Lead a Team, LESSON 4, TOPIC A



## Challenge the Status Quo

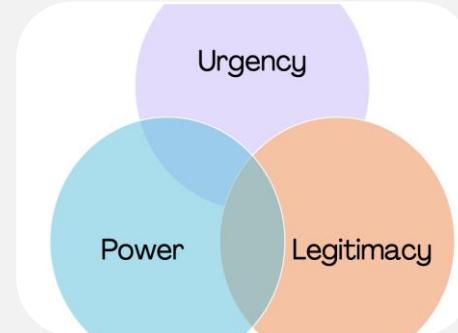
- ✓ Let past experiences and processes provide guidance to but not dictate your actions.
- ✓ Commit to a **growth mindset** to continuously improve and innovate, to find new ideas and perspectives.
- ✓ Discover the best approach through **challenge** and **introspection**.
- ✓ Avoid complacency and blind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

Lead a Team, LESSON 4, TOPIC A

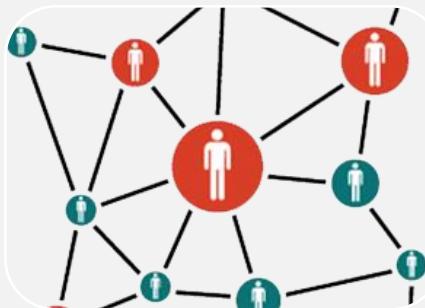
# Spotlight on Successful Persuasion

# 360 View of Stakeholders

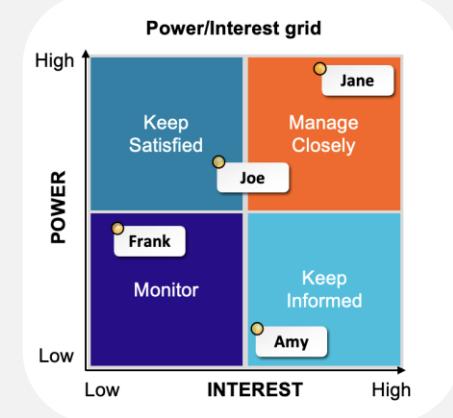
- ✓ Good leadership is based partially on your influence and the influence of the other project stakeholders.
- ✓ Use tools and techniques to ensure that you understand your stakeholders. Some examples:



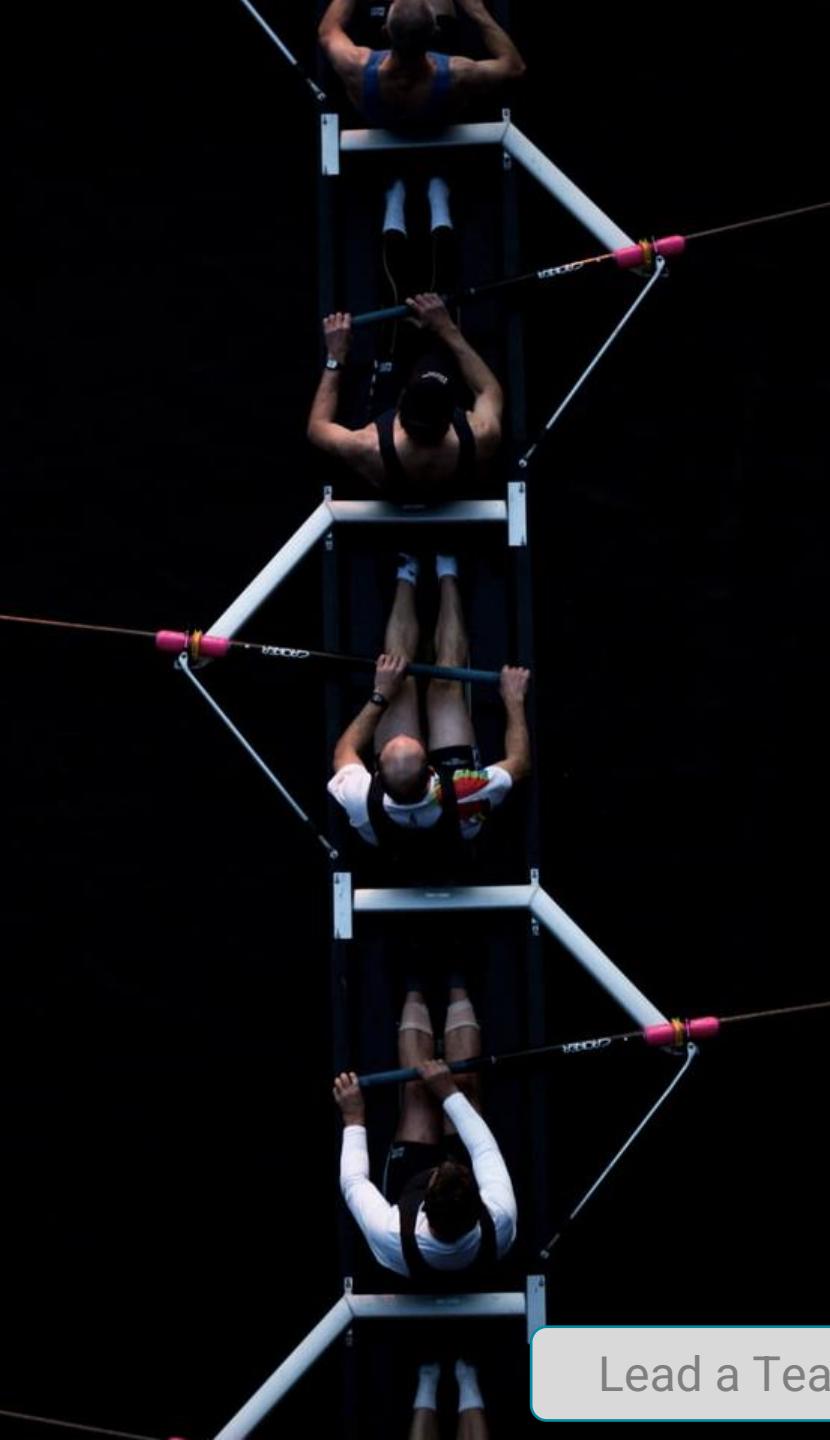
Salience Model



Directions of Influence



Power/Impact/Interest Grid



# Team Building

- ✓ Cohesion and **solidarity** help teams perform better.
- ✓ Good leadership facilitates the **bonding** between project team members.
- ✓ Team-building activities build **unity, trust, empathy, and focus** on the team over the individual.

Lead a Team, LESSON 4, TOPIC A

# Team Building

Use rewards and recognition to keep teams motivated.

## Rewards

- ✓ Tangible, consumable items
- ✓ A specific outcome or achievement achieved
- ✓ Definite start and finish, or fixed time
- ✓ Usually expected when goal is met



Motivate towards a specific outcome; never without recognition too.

## Recognition

- ✓ Intangible, experiential event
- ✓ Acknowledge behavior rather than outcome
- ✓ Not restricted to a set time
- ✓ Usually not expected by recipient



To increase recipient's feeling of appreciation; can be given without a reward

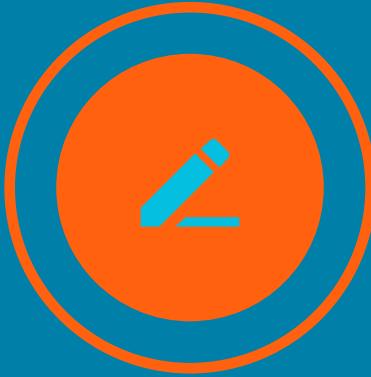
## GUIDELINES

# Lead a Team

- Use emotional intelligence and other leadership methods to motivate your team.
- Adapt your leadership style to work best with each stakeholder.
- Establish good communication among team members, internally and externally.
- Monitor performance of team members on an ongoing basis.
- Manage conflict.
- Establish an issues log to track and assign project issues.

Lead a  
Team,  
LESSON 4,  
TOPIC A





# Support Team Performance

TOPIC B

# Deliverables and Tools



RACI matrix  
Management by Objectives  
Benchmarking  
Performance reports



RACI matrix  
Task boards  
Performance tracking tools  
Information Radiators  
Burnup charts  
Earned Value  
Throughput metrics  
Cycle time  
Value stream map

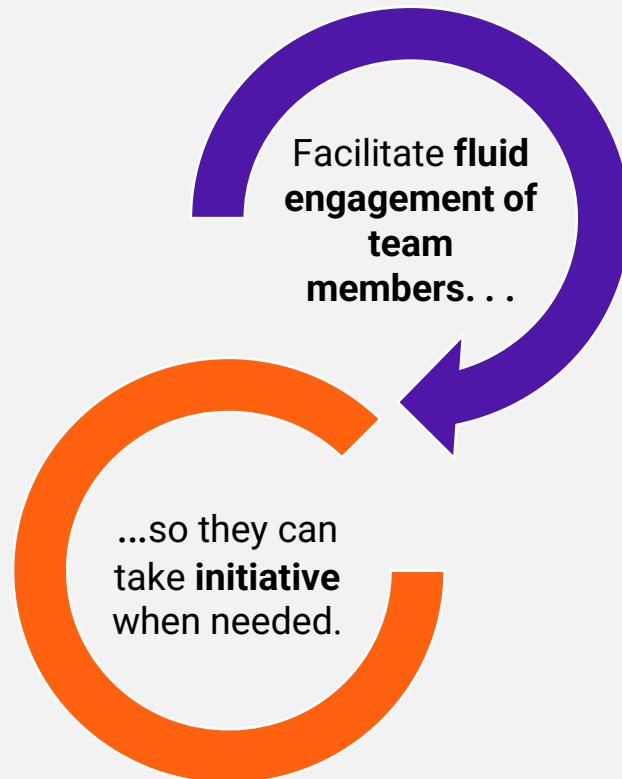
Strive to shape a team with a **healthy culture** of working **autonomy** and a shared **sense of responsibility** for their work.



Support Team Performance, LESSON 4, TOPIC B

# Team Structure and Workspaces

- ✓ Team environments are physical and virtual.
- ✓ Factor in environment and location to team performance.
- ✓ Foster meaningful interaction—this is a core tenet of agile.
- ✓ Respect agreed team working hours and practices.



Use shared workspaces to foster informal and immediate collaboration.



Support Team Performance, LESSON 4, TOPIC B

Team members need to be able to contribute from everywhere and at any time.



# Empowerment and Unity

- ✓ Empower them to make **timely decisions**.
- ✓ Encourage the team's **sense of ownership of the work**.
- ✓ Encourage the team to **foster collaborative work and decision making**.
- ✓ **Prioritize team unity.** Individual contributions are important, but team unity is critical.





# Autonomy and Teamwork

Know when to interfere. In general, people work more productively when granted autonomy.

Include the team in:

- ✓ Clarifying and prioritizing requirements
- ✓ Splitting requirements into tasks
- ✓ Estimating effort

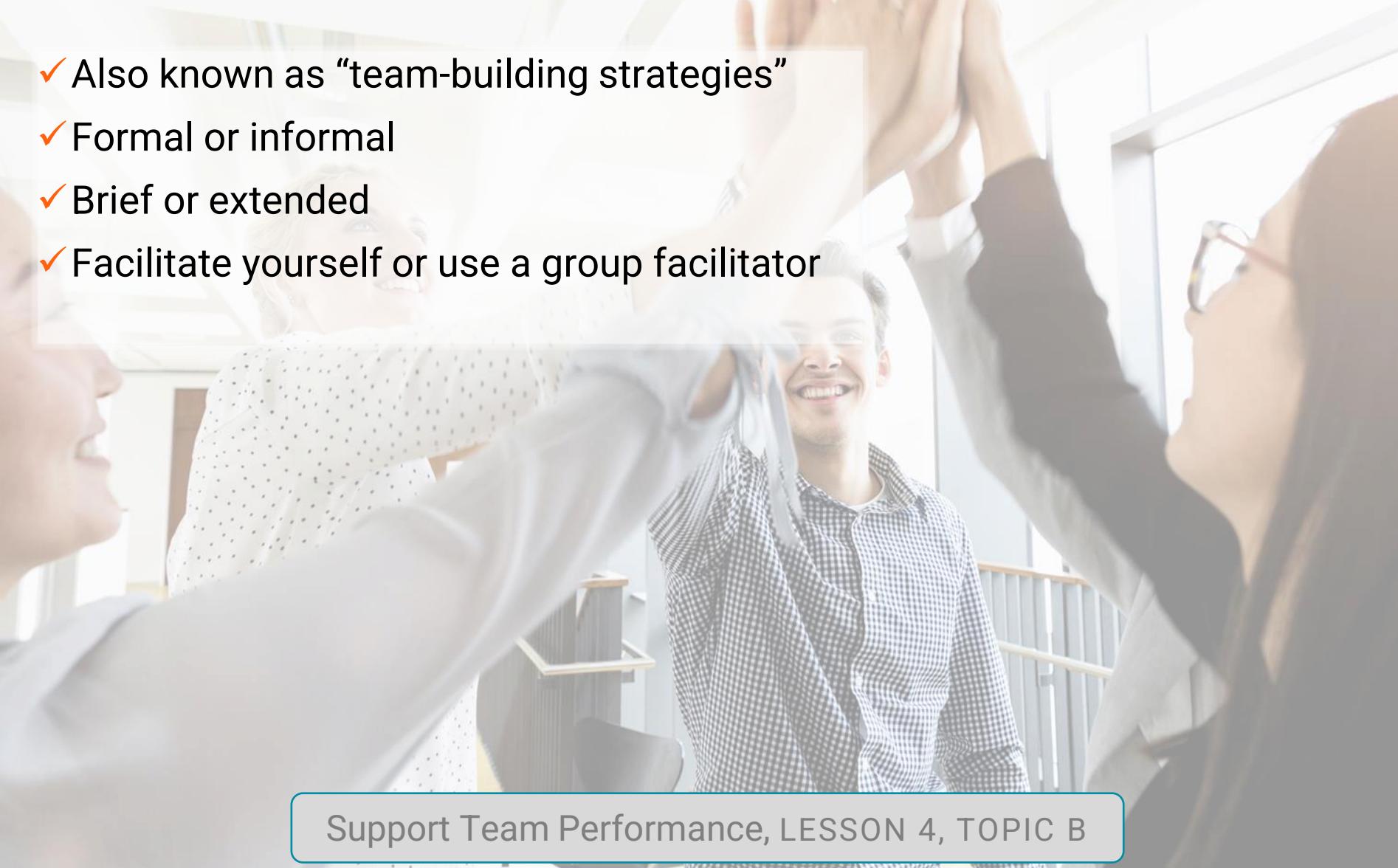


## Keep the Tone Positive and Fluid

- ✓ Establish a culture of **fluid communication** and engagement in a workspace that promotes **positive interactions**.
- ✓ It makes leading and managing a team easier.

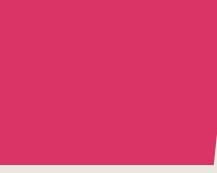
# Team Building Activities

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





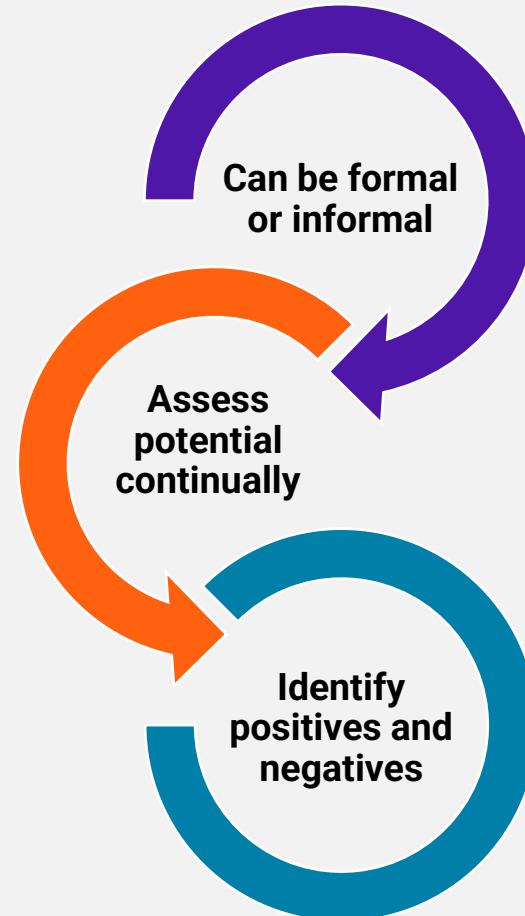
Use team-building activities to influence diverse individuals from many functional areas, each with their own goals, needs, and perspectives, to work as a cohesive team, for the good of the project.



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

# Team Performance Assessments

- ✓ Improve team member interaction
- ✓ Solve issues
- ✓ Deal with conflicts
- ✓ Improve team member skills and competencies
- ✓ Increase team cohesiveness



# Performance Assessment Tasks

- ✓ Compare performance to goals
- ✓ Reclarify roles and responsibilities
- ✓ Deliver positive as well as negative feedback
- ✓ Discover unknown or unresolved issues
- ✓ Create and monitoring individual training plans
- ✓ Establish future goals

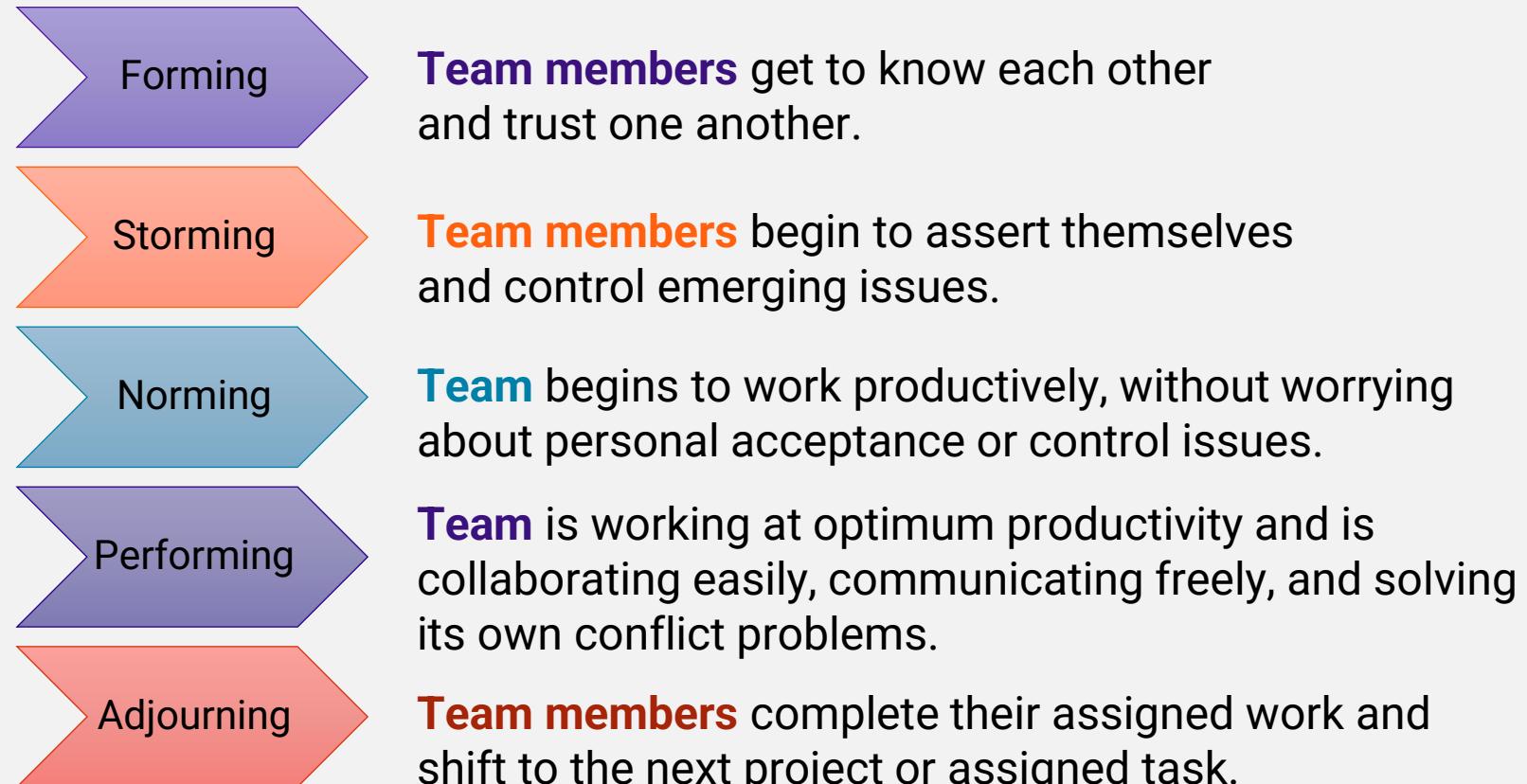




# Team Development

- ✓ Is a process which can **progress and regress**
- ✓ Acknowledges **diversity** and promotes **inclusivity**
- ✓ Requires **trust, communication, and respect**
- ✓ Takes **effort!**

# Team Development Stages (Tuckman ladder)



**More  
about...**

**Course: Leading the Team (2021 Update)**  
**Video: Stages of Personal and Team Development (8:49 run time)**  
**Watch: Start to 3:48 and 5:33 to end**

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



# Manage with Objectives

- ✓ Use clear objectives for a more productive and driven team.
- ✓ Set objectives collaboratively with the team.
- ✓ Create challenging, yet attainable objectives.
- ✓ Conduct objective setting:
  - At the start of a project or phase
  - Throughout the project life cycle, as in an iteration planning session



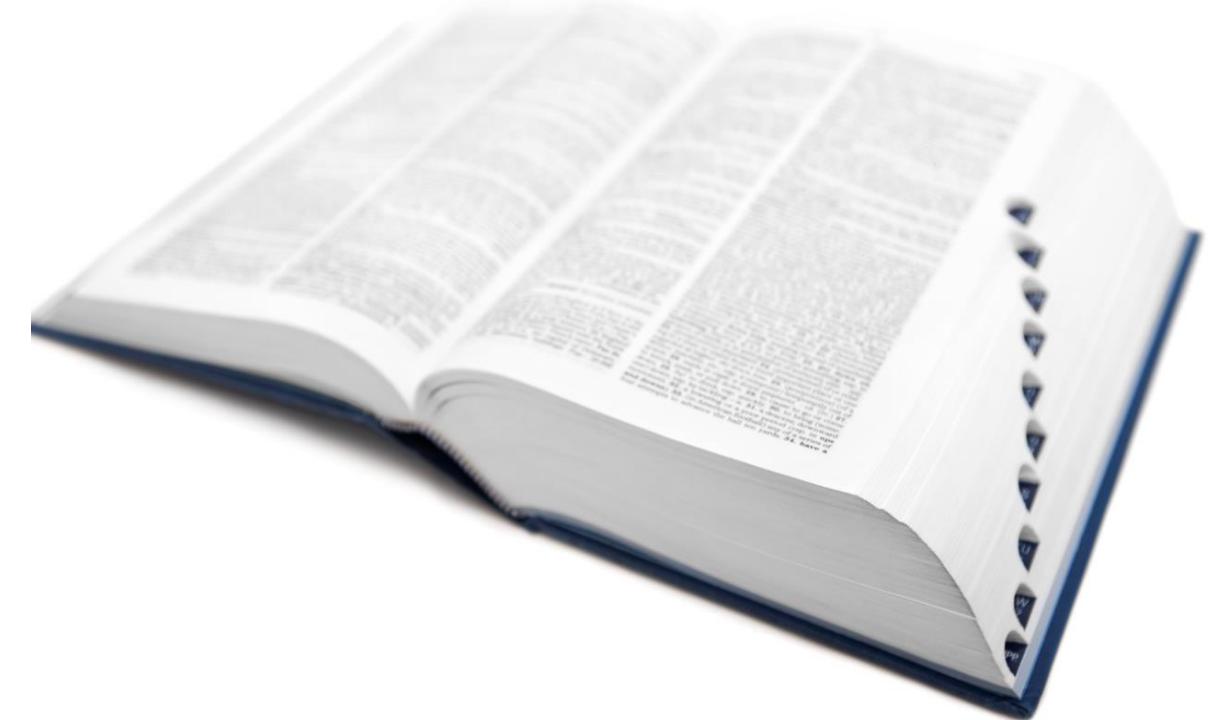
# Feedback

- ✓ Is crucial for any team, using any methodology, in any environment.
- ✓ Discover the most appropriate and timely means of feedback.
  - Public/private
  - Individual/group
- ✓ Give and receive constructive feedback freely.



# **VOCABULARY**

## FROM TODAY'S SESSION



# Communications Management Plan



## DEFINITION

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

# Communication Models



## DEFINITION

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

# Communication Methods



DEFINITION

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

# Stakeholder Engagement Assessment Matrix



DEFINITION

A matrix that compares current and desired stakeholder engagement levels.

# Configuration Management



DEFINITION

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

# Configuration Management System



## DEFINITION

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

# Version Control



DEFINITION

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

# Change Control Systems



DEFINITION

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

# Change Control Board (CCB)



## DEFINITION

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

# Approved Change Requests



## DEFINITION

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

# Issues



## DEFINITION

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

# Issue Log



## DEFINITION

A document where information about issues is recorded and monitored.

# Lessons Learned



## DEFINITION

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

# Lessons-Learned Register



## DEFINITION

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

# Lessons-Learned Repository



DEFINITION

A store of historical information about lessons learned in projects.

# Servant Leadership



## DEFINITION

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

# DAILY BOOTCAMP SURVEY

**Please share your thoughts.**

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

**Thank you for attending Session 5!**