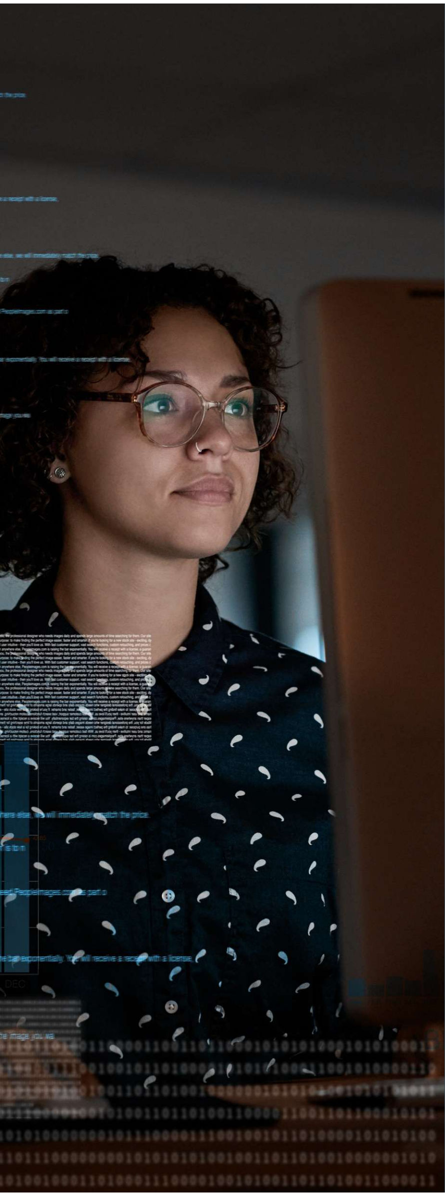


PMP® EXAM PREP BOOTCAMP

Session 2

PMI
Authorized Training Partner

ATTENDENCE TRACKING

Percipio Users:
Name is based on your log in information in Percipio

Using Zoom:
Enter your first and last name

Your Instructor

Orlando Sequera, MSPM, PMP®

www.linkedin.com/in/orlando-sequera-mspm-pmp®-pmi-acp-dasm-dassm-psm-3414478

Orlando Sequera is a certified Project Management Professional (PMP)®, Disciplined Agile Scrum Master (DASM)®, and PMI Agile Certified Practitioner (PMI-ACP)® with over 15 years experience in IT and Aerospace.

Most recently, he managed software development projects for the Artemis program with NASA to land the first woman and the next man on the Moon.

Orlando received his Bachelor's degree in Systems Engineering from Universidad Santa Maria – Venezuela and his Master's degree in Project Management from Boston University.

Your Instructor

Priscilla Bakx-Kabai

Go ROHO: www.goroho.com
priscilla.bakx-kabai@goroho.com

www.linkedin.com/in/pkabai

Priscilla is **passionate about people and projects**. She is an **Authorized Training Partner Instructor (ATP-I)** of the Project Management Institute (PMI), and a certified **Mindset Coach** and **Change Facilitator** by The Arbinger Institute.

She is the **Founder and CEO** of **Go ROHO**, a Netherlands based organization that offers **VPMO (Value Project Management)** and **Consultancy Services** that are founded on a People First Mindset.

Go ROHO stands for **Go Reach One Help One**. This embodies Priscilla's professional vision: **helping individuals thrive**! Three words that best describe her way of working are **Engagement**, **Communication**, and **Teamwork**.

YOUR INSTRUCTOR

Global Webinar Instructor
15,000+ students a year in Project Mgmt. certification bootcamps

Program Director
Project Mgmt. graduate degrees

Sr. Strategy Integrator
For a $12 billion enterprise in the healthcare field

Executive Director
For a multimillion-dollar social services agency

PMI Global Consultant

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

Susan Daniels MBA, PMP, PMI-ACP

linkedin.com/in/susandanielspmp

TARGET AUDIENCE

This Exam Preparation Bootcamp is designed for:

- Anyone preparing to take their PMP exam and need their 35 contact hours for their PMP application.

This Bootcamp is not designed for:

- Anyone preparing for the CAPM exam.
  - Check with your Training Coordinator for the Skillsoft CAPM training. Percipio users use the CAPM self-paced courses.

- Note: Most of the topics in this training are aligned to the CAPM exam objectives

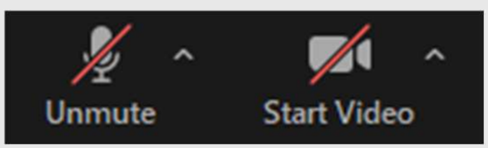
- Missing: The Business Analysis Framework topics are not covered in this Bootcamp.

BREAKS

Yes! We will have periodic breaks.

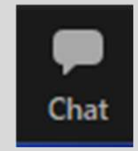
For attendance purposes, please stay logged in during all breaks.

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

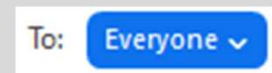


WAYS TO PARTICIPATE

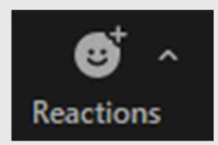
Find the **Chat option** in your Zoom command bar



Change the To: field in the blue box to **Everyone.**



Explore the Reactions option in your Zoom command bar



This is a fun way to provide quick and easy feedback

CHAT vs Q&A

Please use the **Chat** for:

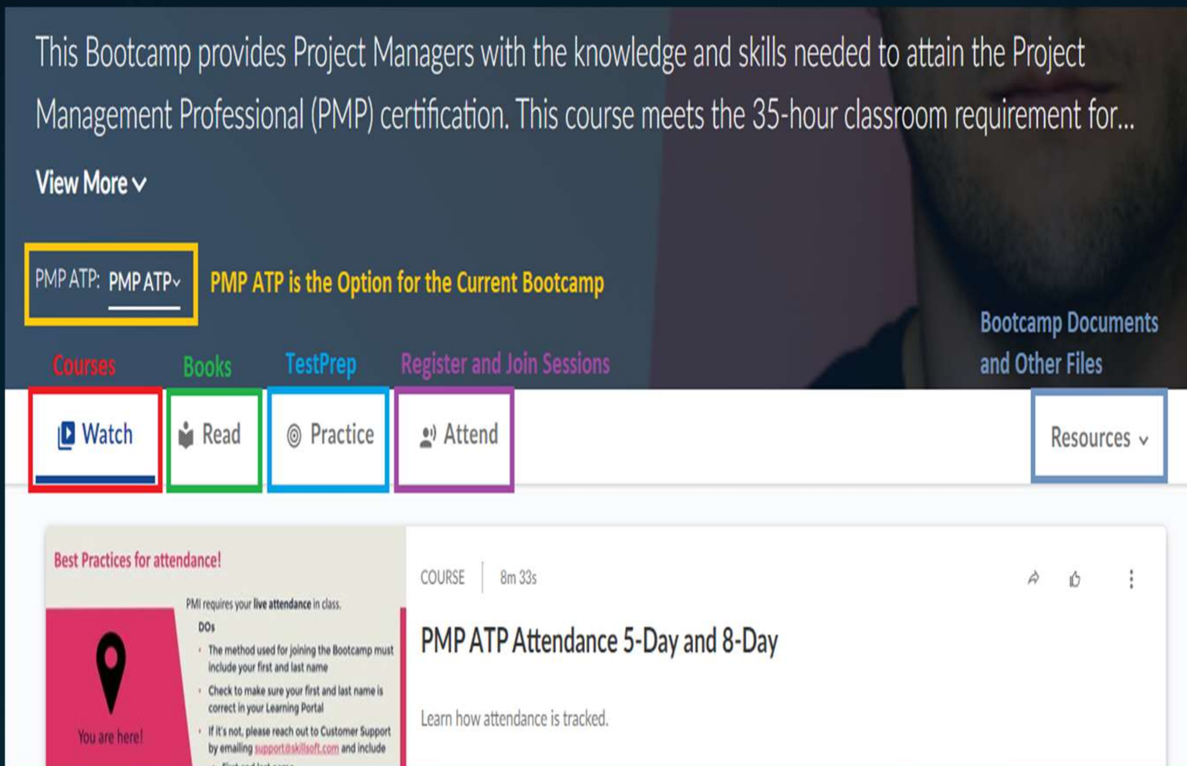
- **Greetings** before the session starts and during breaks
- Once the session starts , the chat may be closed or changed to *Hosts & Panelists Only* to minimize disruptions and focus on important information.
- The instructor may open the chat during the session for student **to respond to the instructor's questions** and create a group dialog.

CHAT vs Q&A

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

- **Technical assistance** – Begin with: Percipio or Non-Percipio student
- Guidance on how to **access course material** – Begin with: Percipio or Non-Percipio
- Clarification and **questions on lecture points**, if not answered by instructor
- The Q&A may be open and closed throughout the session to allow us to address questions/issues in a timely manner.
- **Please be very patient, the support team responds to many inquiries per session**

ACCESSING COURSE MATERIALS



If you are part of the Onward to Opportunity program,

and you are not sure how to find your resources in Percipio, …

please check with your O2O advisor about locating your resources or use GitHub

ACCESSING COURSE MATERIALS

[https://github.com/Skillsoft-Content/**PMP5Day**](https://github.com/Skillsoft-Content/PMP5Day)

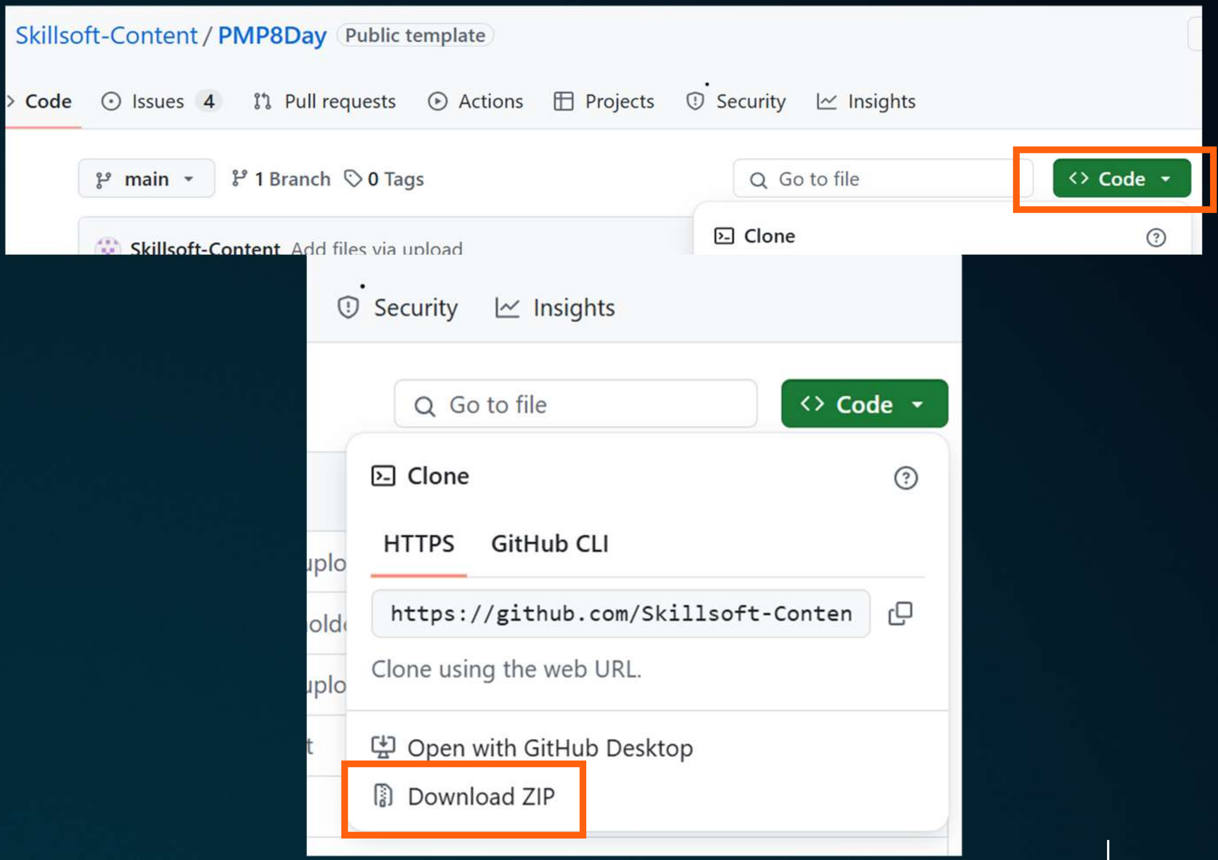
Or

[https://github.com/Skillsoft-Content/**PMP8Day**](https://github.com/Skillsoft-Content/PMP8Day)

Any user can access the resources from GitHub even Percipio users.

1. **Click <> Code**
2. **Download Zip.**
3. **Right click to unzip the downloaded .zip file.**
4. **Access the files from the folders.**

Also check your learning portal for any available courses, books or test-prep exams



PMI LEARNER KIT

- If you intend to take the PMP exam, you are required to have your own Learner Kit before submitting this training on your application to PMI for the hours to be recognized as authorized training.
- ***<u>This is a PMI Requirement</u> as part of the Authorized Training Partner Agreement (ATP) agreement between Skillsoft and PMI.***
- .

PMI LEARNER KIT

- The PMI Learner Kit must be purchased through Skillsoft and redeemed through PMI.
    - Please see the **PMI Learner Kit Instructions** file in your Bootcamp documents in Percipio or GitHub..
    - Please contact your corporate training administrator for support.

- WHAT IF,...

1. Your organization isn't providing you access to the kit
2. You have an individual subscription to Percipio, or
3. You are not a Percipio user, then

You can purchase a kit using the following URL: https://www.skillsoft.com/pmp-voucher-offering

IS LIVE ATTENDANCE REQUIRED?

- **YES,** if you are taking this training to register for the PMP exam
- You are **allowed to miss up to two sessions IF** you make up the sessions by **watching the video replays**.
- A **missed** session **means** you were disconnected for **more than a total of 15 mins** for the duration of the session.
- If you **miss three or more sessions**, you will need to make up the missed time by **attending live in another 8-day cohort**.
- *Please see the Bootcamp Calendar for information about upcoming sessions at: http://calendar.skillsoft.com/

ACCESSING THE VIDEO REPLAYS

1. Go to: https://github.com/Skillsoft-Content/PMI-PMPReplay
2. Replays will be available within 2 business days after the session ends.
3. Click on the Excel file for the year you attended the Bootcamp. You won't see a *file open* option, but it is selected.
4. Click the *Download raw file* button on the far left-hand side.
5. Open the downloaded file using this password: pmpB00tcampReplay!

Those are zero's not the letter O. The password is case sensitive.

7. Locate and open the worksheet tab that corresponds with the bootcamp you attended
8. Make a note of the passcode.
9. Paste the provided link into your browser.
10. Complete the required registration steps
11. Input the passcode when prompted
    The password to open the Excel file is NOT the passcode to access the replay.

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

No limit to watch replays to study

STAYING CONNECTED

Disconnecting from Percipio or Skillport on a regular basis in the Live Session?

- Please contact **Customer Support** directly https://support.skillsoft.com/bootcamps for assistance.
- **Ask for the Zoom details** in the session through the Q&A to join directly through Zoom **as a backup** (good for all sessions in your Cohort).
- **Track** your total **time missed**/disconnected from the session over the 4 hours
- **No need to let us know you have rejoined the session** after being disconnected or that you have missed time. These messages will be dismissed.

LOG IN W/ CORRECT NAME

Joining from your Learning Portal:

- Check your first and last name is correct in your Learning Portal.
- If it is not visible in your learning portal, check a **course completion certificate** (if available) or ask the **Admin** within your training organization.
- If you don't know whom that person is, please reach out to Skillsoft Support **support@skillsoft.com** to see if they can provide their contact details.

Joining through Zoom:

- If you join through the browser link, please enter your First and Last Name when prompted
- If you join through Zoom using the Desktop Client or Phone App, please use a Zoom account created through Zoom that has your First and Last Name.

ATTENDANCE TRACKING

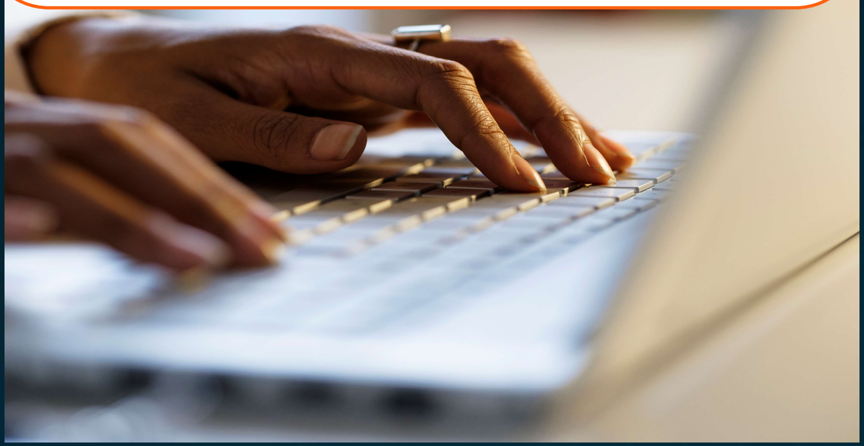
1. Although Percipio and Zoom systems track your grand total time logged in.
   - **YOU HAVE TO TRACK YOUR OWN ATTENDANCE**
2. The mentors can't see/verify that information for you.
3. The attendance tracker is **submitted at the end of the** 5 day or 8-week **course and not before**.

4. PMI-ACP Attendance Tracker file is a Word document with instructions. It **does not** have your attendance recorded.

5. You will need to fill out the table on page 1 and upload it if you must manually request your certificate of completion. Information on manually requesting certificates is covered in an upcoming slide.

THE ATTENDANCE TRACKER

Percipio Users:
Check the **Resources tab** to the right of Attend tab in your Bootcamp channel to download it to your computer.



All Users:
https://github.com/Skillsoft-Content/PMP5Day

Or

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

1. Click <> Code
2. Download Zip
3. Right click to unzip the downloaded .zip file.
4. Access the files in the folders

TRACKING ATTENDANCE EXAMPLE

On Page 1 of your Attendance Tracker **for each session:**

- **Record total missed time**

Or

- **Record 0, zero**, if you have not missed time in a session.

Calculation Example

Session Starts

- Disconnected: 11:00 AM
  Rejoins: 11:05 AM
- Disconnected: 1:15 PM
  Rejoins: 1:17 PM

Session Ends

Time Missed 11:05 - 11:00 **= 5 mins**
Time Missed 1:17 - 1:15 **= 2 mins**
Total Time Missed = 7 mins

CERTIFICATE OF COMPLETION

Percipio Users:
When attending live,..
always login through Percipio even if you are simultaneously logged in through Zoom.

- This helps ensure Percipio auto generates the certificate at the end.

To check your certificate auto-generated after the last session:

Log into Percipio
> Select **My Learning** in the upper right corner
> Select **Learning activity**
> Select the **"PMI PDU"** tab
> Locate your **ATP PMP Bootcamp**
> Select the **three vertical dots** to the far right
> Click **Download Certificate.**

CERTIFICATE OF COMPLETION

PERCIPIO USERS

Your **certificate will not auto generate** after the last session ends **IF** the following situations happen:

1. You didn't log into the Bootcamp through Percipio or the Percipio calendar link for one or more sessions.
2. You missed too much time in one or more sessions.
3. Your organization turned off certificates.

Then you will have to manually submit an application for the certificate of completion.

CERTIFICATE OF COMPLETION

NON PERCIPIO USERS and
PERCIPIO USERS (who don't have their certificate auto-generated)

- To manually request your official certificate:
  Review the instructions in the Attendance Tracker file, which explains how to **manually request a certificate**. **DO NOT** manually request a certificate until **after the Bootcamp is over** and you have **made up any missed session(s)** if applicable.

Attendance Tracker Word document file can be found at:

https://github.com/Skillsoft-Content/ PMP5Day
https://github.com/Skillsoft-Content/ PMP8Day

1. Click <> Code
2. Download Zip.
3. Right click to unzip the downloaded .zip file.
4. Access the files in the folders.

VIDEOS TO WATCH

We recommend watching the following videos in between the 1st and 3rd sessions

Percipio Users:

- PMP ATP Certificates of Completion
- PMP ATP Learner Kit Information

All Users Via GitHub:

- Certificates of Completion
- PMP ATP Learner Kit Information

Attendance Tracker Word document file can be found in GitHub: https://github.com/Skillsoft-Content/ PMP5Day **or** https://github.com/Skillsoft-Content/ PMP8Day

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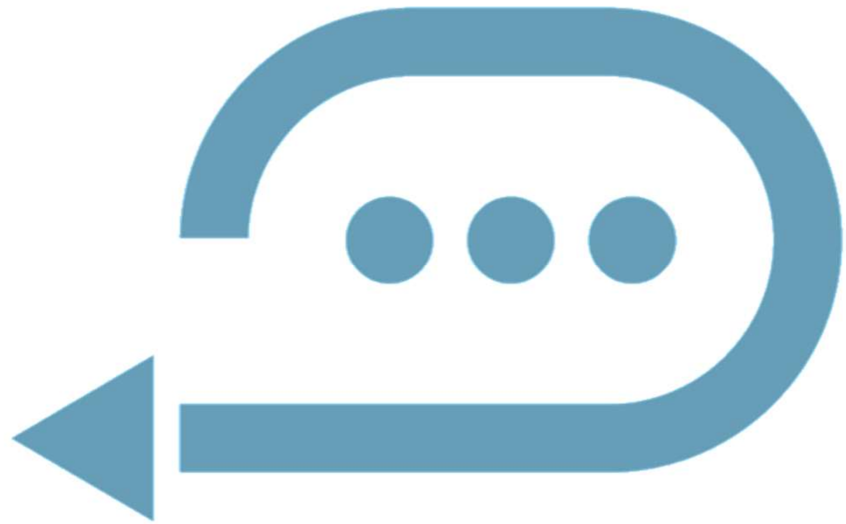


Mapping this course to the Student Workbook

	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 1

BUSINESS ENVIRONMENT

- Foundation
- Strategic Alignment
- Project Benefits and Value
- Organizational Culture and Change Management
- Project Governance
- Project Compliance

Version 3.2 | 2023 Release

Learning Objectives

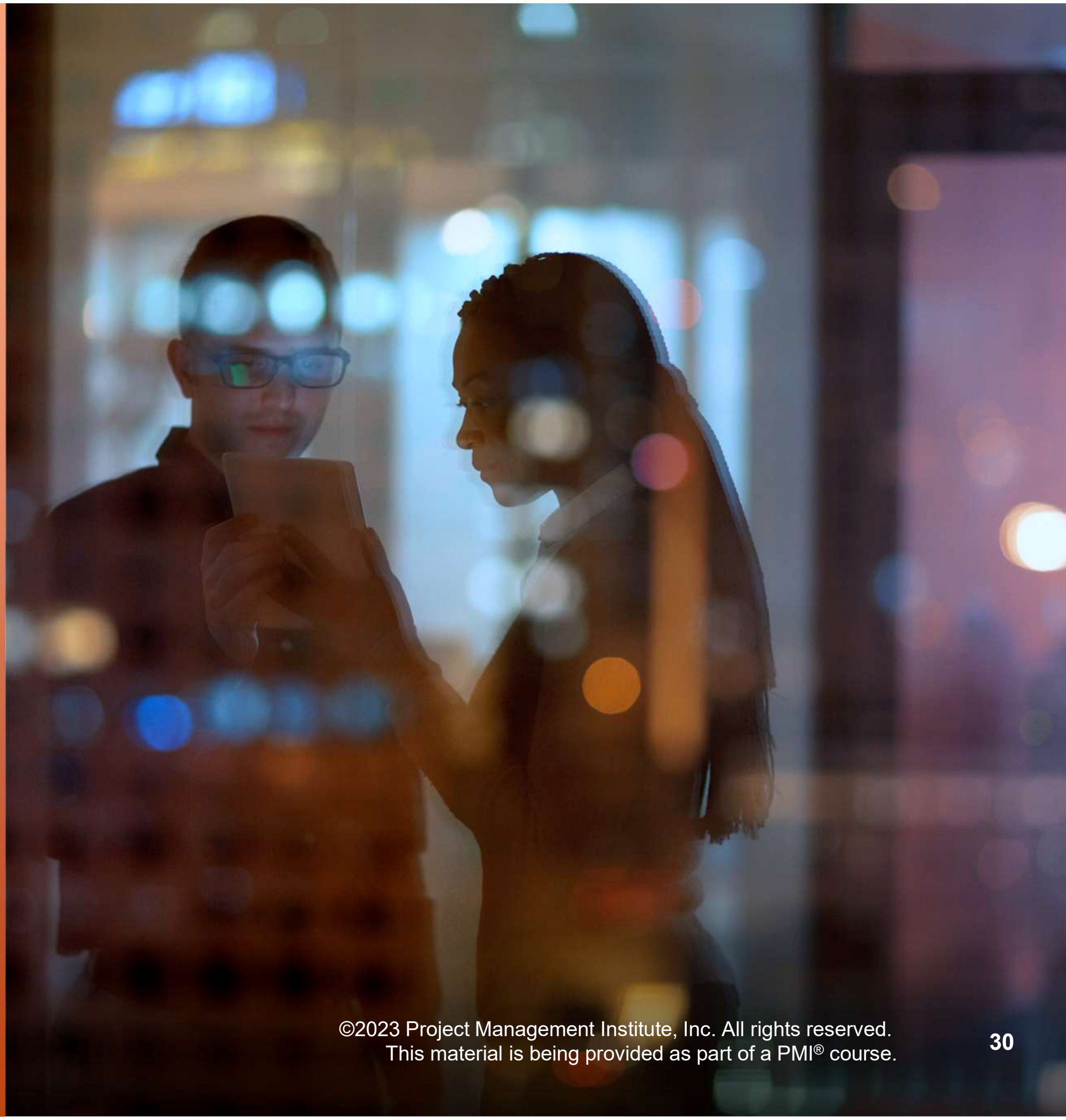
- Define 'project' and how it relates to the larger discussion of project management.
  - Discuss the different types of organizational structures and how they relate to your project's management.
  - Discuss the principles of project management.
  - Discuss the principles of agile and how they relate to your project's management.
- Discuss strategic alignment and its elements.
  - Explain the impact of business factors on strategic alignment.
  - Determine how projects align with business strategy.
- Identify types of business value.
- **Describe change management theory and its relation to organizational change.**
- **Define and discuss project governance.**
- **Explain project compliance and its importance.**

Organizational Culture and Change Management

TOPIC D

Change Management*

- Organizations embrace change as a strategy.
- PMOs build and sustain alignment between projects and the organization.
- Whether your organization has a PMO or not, you are a “changemaker”!
  - Tailor a strategy to circumstances, people and timing
  - Use a robust approach



Manage Organizational Change Impacts on Projects

- **Assess** organizational culture
- **Evaluate** impact of organizational change to project and determine required actions
- **Recommend** options for changes to project
- Continually **monitor** external business environment for impacts to project scope/backlog

Risk, Culture and Change in Organizations

Risk threshold and appetite are shaped by diverse values of:

- Country/region
- Industry/sector
- Leadership
- Project team

These must be understood with care to:

- Establish effective approaches for initiating and planning projects
- Identify the accepted means for getting work done

Change Management Framework

“Organizational change requires individual change”

The **ADKAR**® model names five milestones an individual must achieve in order to change successfully:

- **A** – Awareness of the need for change
- **D** – Desire to support the change
- **K** – Knowledge of how to change
- **A** – Ability to demonstrate new skills and behaviors
- **R** – Reinforcement to make the change stick

Actions to Support Change

DO

- **Coach co-workers to support the business** — patience and compassionate mentoring are key
- **Enable an agile operating system -** Coach team members in agile to facilitate adoption of a change-centered mindset
- **Keep knowledge current** – Continuously improve processes and knowledge

DON'T

- **Force changes** – Involve and consult; aim to secure buy-in to the reasons for change
- **Alienate resisters** – Change can breed conflict, so proceed carefully

Plan for Change

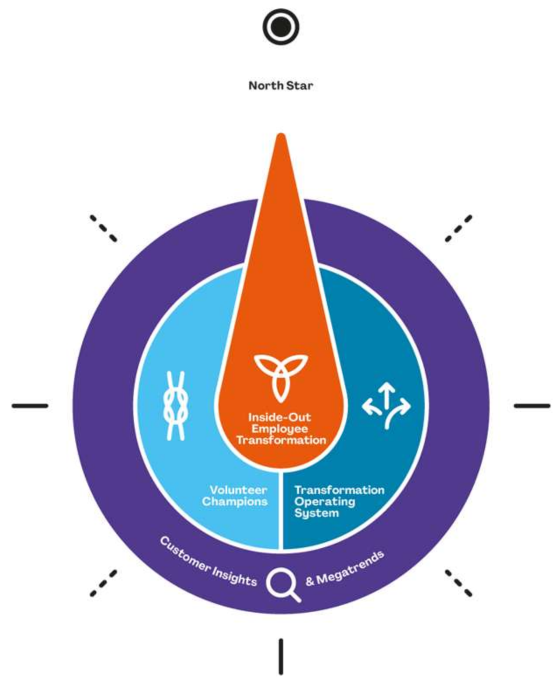
Define the knowledge transfer, training and readiness activities required to implement the change brought by the project

- Include an **attitudinal survey** to find out how people are feeling
- Create an **informational campaign** to familiarize people with changes
- Be open and transparent about potential effects of the changes
- Consider creating a rollout plan

The rollout plan is not a project management plan component.

Organizational Transformation for Project Practitioners

- A **North Star statement** articulates the vision and strategic objectives
- **Customer insights** and **global megatrends**
- A flat, adaptable cross-functional **transformation operating system**
- Internal **volunteer champions** (not external consultants)
- **Inside-Out Employee Transformation** (similar to ADKAR)



Brightline® - a PMI initiative

The Brightline(R) Transformation Compass and five building blocks of transformation - an enterprise-level change management framework

ECO Coverage

3.4 Support organizational change

- Assess organizational culture (3.4.1)
- Evaluate impact of organization change to project, and determine required actions (3.4.2)
- Evaluate impact of the project to the organization and determine required actions (3.4.3)

Project Governance

TOPIC E

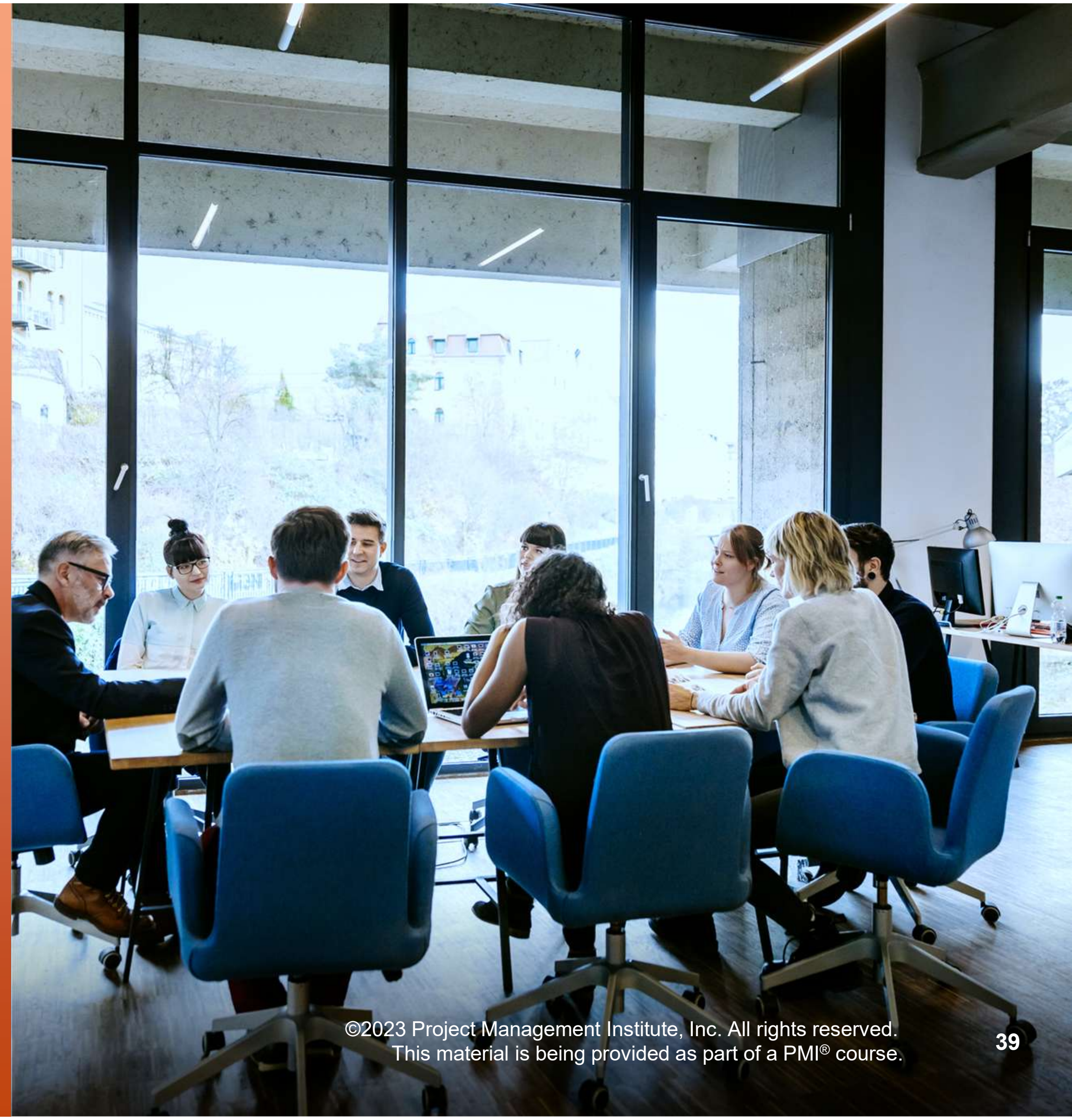
Project Governance

The framework, functions, and processes that guide project management activities to create a unique product, service, or result to meet organizational, strategic, and operational goals.

Key benefits:

- Offers a single point of accountability
- Encompasses the **project life cycle**

Governance type differs among organizations and projects.



Project Governance

What Kind and How Much?

Too much governance can annoy stakeholders, while relaxed governance can lead to a lack of stakeholder engagement or accountability.

Governance:

- Is typically already in place – established by a PMO or aligned with organizational policies
- Depends on strategic importance of project, constraints or oversight requirements

- *Critical for managing internal or external business environment change and deviations in budget, scope, schedule, resources or quality*
- *Budget management oversight is a key governance area.*

Project Governance: Components

Processes for:

- Change
- Communication
- Documentation—e.g., project management plan
- Decision-making
- Internal stakeholder alignment with project process requirements
- Review and approval of changes above project manager authority level
- Risk and issue identification, escalation, and resolution
- Stage gate or phase reviews
- Guidelines for aligning project governance and organizational strategy
- Project life cycle and development approach
- Project organization chart with roles
- Project success and deliverable acceptance criteria
- Relationship among project team, organizational groups, and external stakeholders

Governance in Adaptive Projects

Can:

- Document outputs and expectations
- Provide a clear view of project status from:
    - Defined iteration/sprint expectations and outputs
    - Releases tied to specific dates
    - “Real-time” monitoring of project output through daily standups

Iterative approaches enable quicker and less costly identification of value-based outputs than predictive

Governance Board

aka Project Board or Steering Committee

Does anyone have experience with a project governance board? Describe how it works with your project.

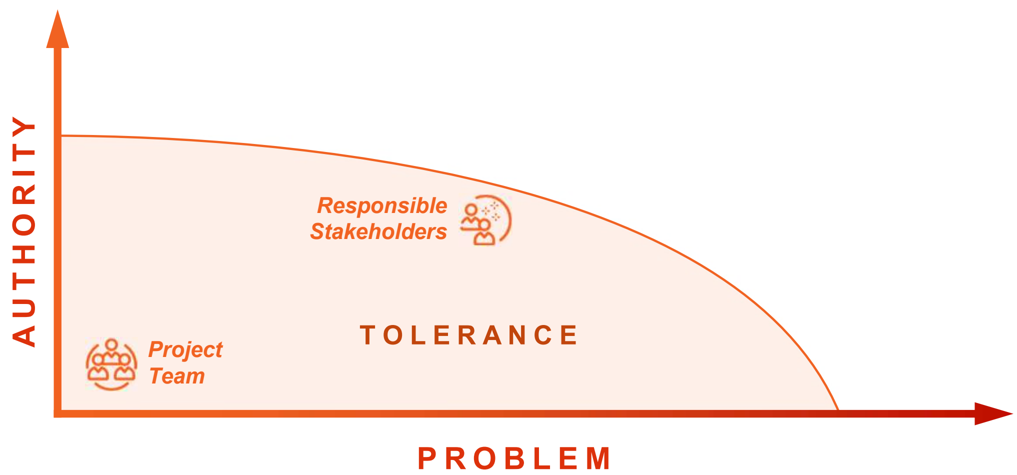
- Provides project oversight
- May include project sponsor, senior managers and PMO resources
- May be responsible for:
  - Reviewing key deliverables
  - Providing guidance for project decisions

Projects that use Scrum or SAFe® use intermediary governance boards to liaise between the project and organizational governance

Governance Defines Escalation Procedures

For problems outside a project's **thresholds** or **tolerance** levels:

- **Escalate** to the responsible stakeholder who is authorized to take action;
- But if an issue is within the threshold, then work with the team to find a resolution.



Governance and Life Cycles

A Systems View

Remember the project management principle - ***Recognize, evaluate and respond to system interactions***

Governance system works alongside the value delivery system — the **project life cycle**.

Why? To enable smooth workflows, manage issues and support decision making.

Value delivery *as product of* life cycle

Value delivery *embedded in* life cycle

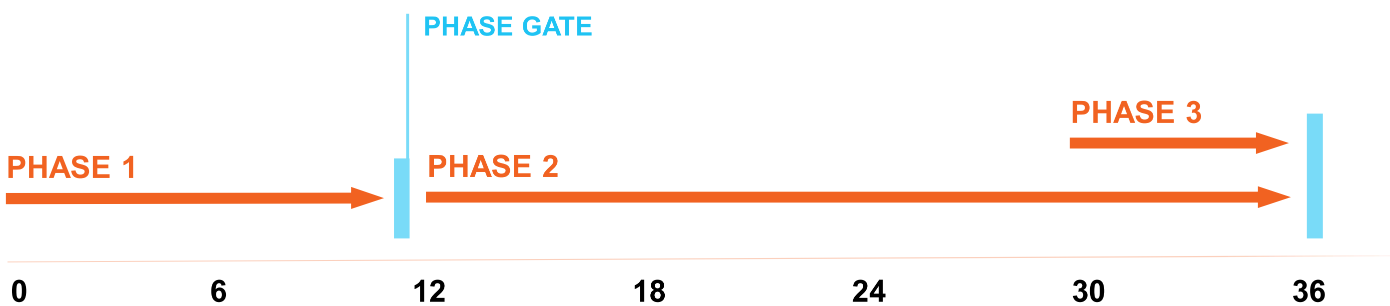
Governance Checkpoints: Phase Gates and Iterations

Predictive	**Adaptive**
Split work into **phases**	Split work into releases
Review results at a **phase gate** – aka, governance gate, kill point, or tollgate	Review results at end of iterations
Decide: • Continue to the next phase • Continue with modifications, or • End a project or program	Gather feedback and take action to improve value in next iteration
	Continue until customer's acceptance criteria – e.g., definition of done or **MVP** – is satisfied or project ends

Project Phases
Relationships

Phases produce one or more deliverables; outputs from one phase are generally inputs to the next phase.

They can have **sequential** or **overlapping relationships**.



Apply Governance to Predictive Project Phases

ANG FEN

At the beginning of a phase:	• Verify and validate project assumptions • Analyze risks • Provide detailed explanation of phase deliverables
At the end:	• Key deliverables produced • Review to ensure completeness and acceptance

If huge risks are encountered, deliverables are no longer needed or requirements change, a phase or project will be terminated.

ECO Coverage

2.14 Establish project governance structure

- Determine appropriate governance for a project (e.g., replicate organization governance) (2.14.1)
- Define escalation paths and thresholds (2.14.2)

Project Compliance

TOPIC F

Compliance

- Internal and external standards include:
  - Government regulations
  - Corporate policies
  - Product and project quality
  - Project risk
- PMO monitors compliance at organizational level
- Project team is also responsible for project activity-related compliance, including:
  - Quality of processes and deliverables/products
  - Procurement and work by vendors

Compliance Requirements

Legal or **regulatory** constraints include:

- Requirements for specific practices
- Standards
- Privacy laws
- Handling of sensitive information

Quality: Tailor to your project — How much process rigor and quality control is relevant?

Compliance Categories Classification

- Environmental risks
- Workplace health and safety
- Ethical/noncorrupt practices
- Social responsibility
- Quality
- Process risks

Categories vary based on:

- Industry and solution scope
- Unique legal and regulatory exposure

Compliance Threats

How to Investigate

- Where/who in the organization handles compliance?
- What legal or regulatory requirements impact the organization? e.g. workplace safety, data protection, requirements for professional memberships
- What is the organization's **quality policy**?
- Are the team and stakeholders aware of compliance matters?

Treat Compliance as a Project Objective

- Proactively track and manage risks for compliance requirements
- Be prepared to perform quality audits
- Continuously validate legal and regulatory compliance for deliverables
- Check compliance before the end of the project to avoid transferring issues
- In a risk or dedicated compliance register, include:
  - The identified risk
  - A responsible risk owner
  - Impact of a realized risk
  - Risk responses

Larger organizations or those in highly regulated industries typically have a compliance department or officer.

Compliance

Five Best Practices

- **Documentation:** Updated compliance needs and risks
- **Risk planning:** Prioritize compliance in risk planning
- **Compliance council:** Includes quality/audit specialists and relevant legal/technical specialists
- **Compliance audit:** Formal process
- **Compliance stewardship:** It’s your responsibility!

Interactive/Activity

Let's talk about compliance.

- Does your organization have a quality policy?
- Do you know where to find the quality policy or standards for your projects?
- What kinds of compliance activities are you involved with?

ECO Coverage

3.1 Plan and manage project compliance

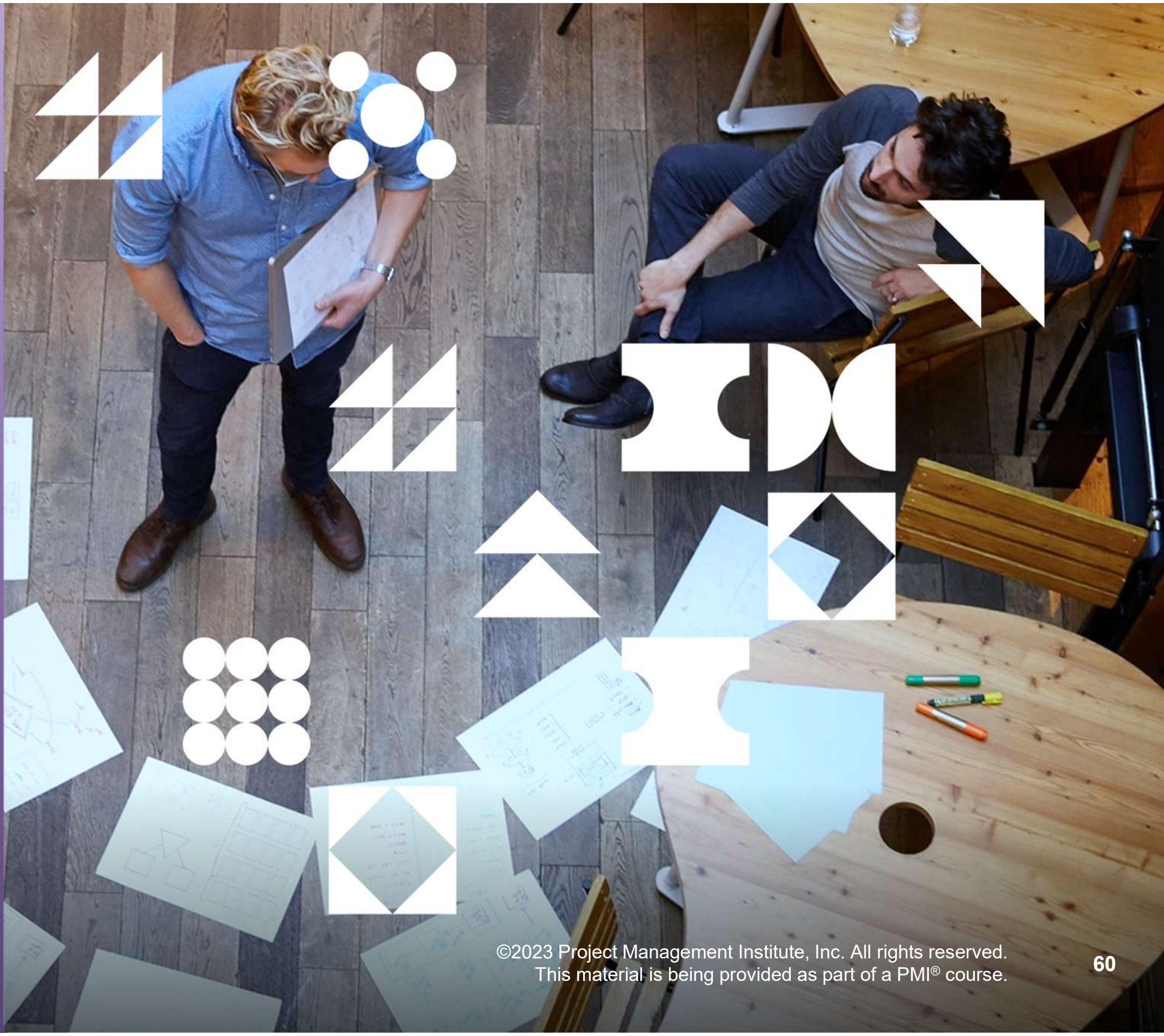
- Confirm project compliance requirements (e.g., security, health and safety, regulatory compliance (3.1.1)
- Classify compliance categories (3.1.2)
- Analyze the consequences of non-compliance (3.1.5)

End of Lesson 1

LESSON 2

START THE PROJECT

- Identify and Engage Stakeholders
- Form the Team
- Build Shared Understanding
- Determine Project Approach



Learning Objectives

- **Define and discuss stakeholders and the most effective ways to communicate with them.**
- **Explain the best ways to form a team.**
- Describe how to build the most effective understanding of a project and how doing so relates to executing a project successfully.
- Explain how predictive and adaptive project life cycles work; explain what a hybrid development approach is.
  - Decide which kind of development approach or life cycle is best suited for work.

Identify and Engage Stakeholders

TOPIC A

Typical Project Stakeholders*

Can you categorize these stakeholders?

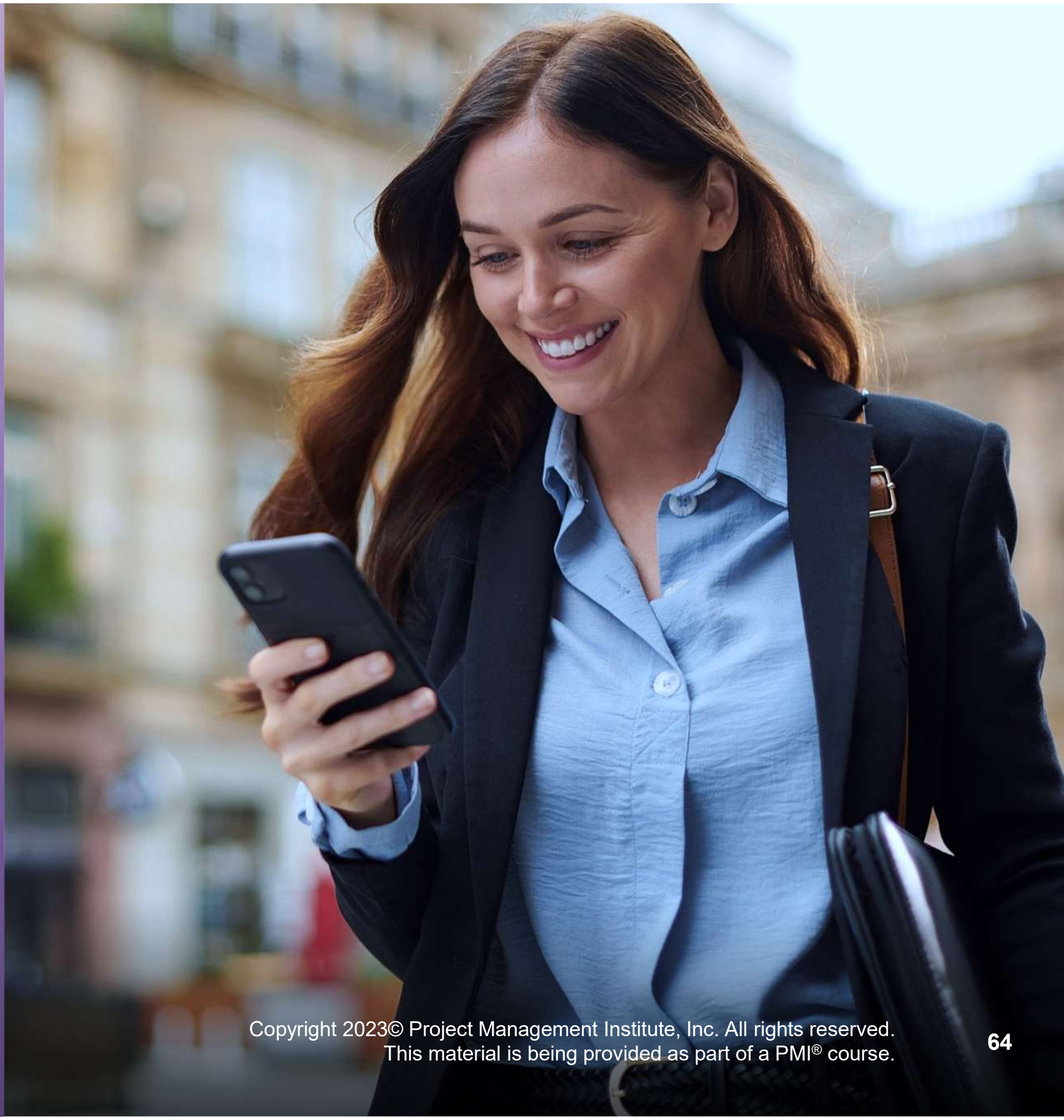
- *Which are typically project team members? Which are not?*
- *Which are typically active in project work?*

- End users
- Customers
- Employees
- Organization
- Managers
- Sponsors
- Business partners
- Suppliers and contractors
- Government
- Community

Stakeholder and Communications Management

Overview

- Stakeholder register
- Stakeholder engagement plan
- Communications management plan
- Stakeholder engagement assessment matrix (SEAM)
- Assessment grids / matrices / models



Stakeholder Identification

Who are they?

- Check the **business case** and **benefits management plan** for names
- Later, check the **issue/impediments log**, **change log** or **requirements documents** to see who else is needed or named

What's their relationship to the project?

- Interest
- Involvement
- Interdependencies
- Influence
- Potential impact on project success

Identify and engage stakeholders early to avoid surprises later in the project!

Assess Stakeholders

Data Gathering

- Questionnaires and surveys
- Brainstorming

Data Analysis

- **Stakeholder analysis** — What are their “stakes” in the project? — i.e., interest, rights, ownership, knowledge, contribution
- Document analysis

Data Representation

- Two-dimensional (2D) grids
  - Power/interest
  - Power/influence
  - Impact/influence
- 3D grid — Stakeholder “cube”
- Salience model
- Directions of influence

Create the Stakeholder Register

- Capture and record important stakeholder information
- Factor in OPAs
- Update it! Describe the evolving relationship with stakeholders throughout the project

Contains the information necessary to execute the stakeholder engagement plan

- Refer to **stakeholder registers** from previous, similar projects for help
- Remember this is a public document, so ensure the information presented is appropriate

Stakeholder Register

	Name	Title	Internal / External	Project Role	Major Requirements	Expectations	Influence / Attitude
1	Eugene Lowe	CEO	Internal	Sponsor	Successful completion	On-time completion, successful partnerships	Champion
2	Oasestown Municipality		External	Government partner (liaison); funding contributor; owner of SLC site	Successful completion of facility and partnership;	Accountability	Supporter
3	Kara Black	Principal, Oases Architects	External	Partner, designer, specialist knowledge (conservation building)	Clear design brief, successful partnership	Fluid funding and communication, design autonomy	Champion
4	Josie Bynoe	Chair, BOD	Internal	Direct strategic local partnerships for Shawpe	Environmental sustainability of project work; "moral rights"	No damage to Oasestown conservation district or environs	Resistor
5	Helen Grey	Lead, business development	Internal	Product owner	High profile tenants, excellent community and conservation credentials	Organizational learning; leadership opportunity	Neutral
6	Hasan Persaud	VP of Business Development	Internal	Portfolio owner	Capacity for ongoing revenue	End-user in Phase 3	Neutral
7	Mandeep Chahal	VP of Finance	Internal	Budget controller	direct contact with funding partners	clear data	Neutral
8	Kei Leung	VP of Marketing	Internal	Marketing expert	elevation of brand	high quality tenants	Supporter
9	Tenants		External	Income source	bespoke spaces	high quality	Neutral
10	Contractors		External	Vendors - building	clear instructions, contract		Neutral
11	Oasestown local residents		External	Neighbors to project	Traffic and noise pollution management	no inconveniences	Resistor
12	Oasestown Community Partnership		External	Community group operating in Oasestown	none	a free space in the SLC	Champion

Know Your Stakeholders

Go Beyond Job Titles

Power	Level of authority
Interest	Level of concern about project outcomes
Influence *aka* ***attitude*** *or* ***impact***	• Ability to influence project outcomes or cause changes to planning or execution • Magnitude of potential contribution or disruption to project *Use a descriptive term — e.g., champion, supporter, neutral, detractor*

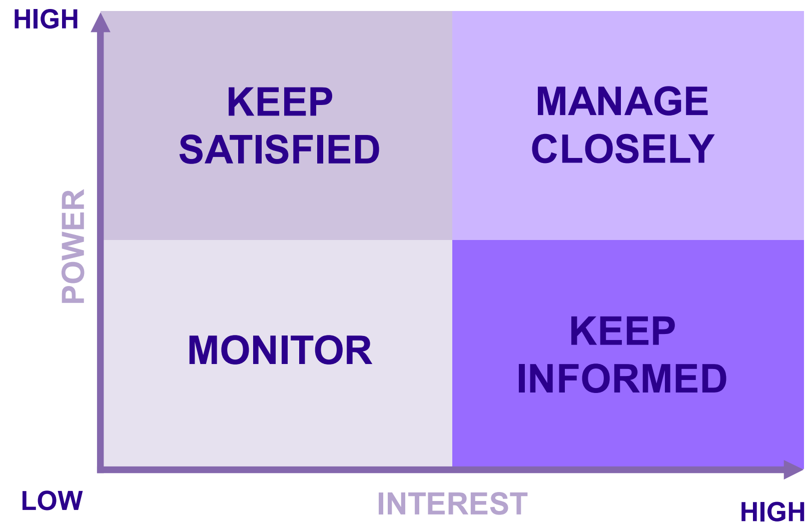
Tailor stakeholder assessments to suit project needs. The goal of this exercise is to facilitate your planning of effective communication with the stakeholders!

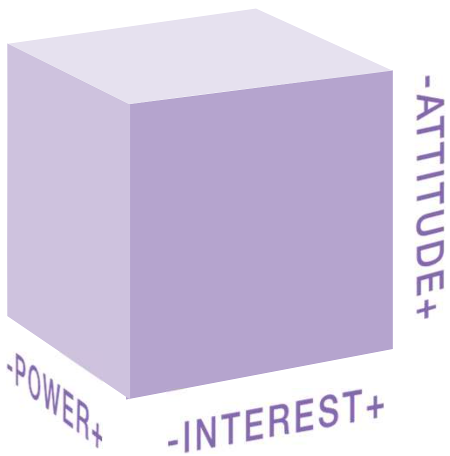
Stakeholder Mapping

Use two dimensions to map stakeholders:

- **Power** and **interest grid**
- **Power** and **influence grid**
- **Impact** and **influence grid**

Or use three dimensions – a **cube** – to refine the analysis further!





Method:

- Place each stakeholder on the grid (*do not use names*)
- Use the same quadrant labels, but change the axis labels

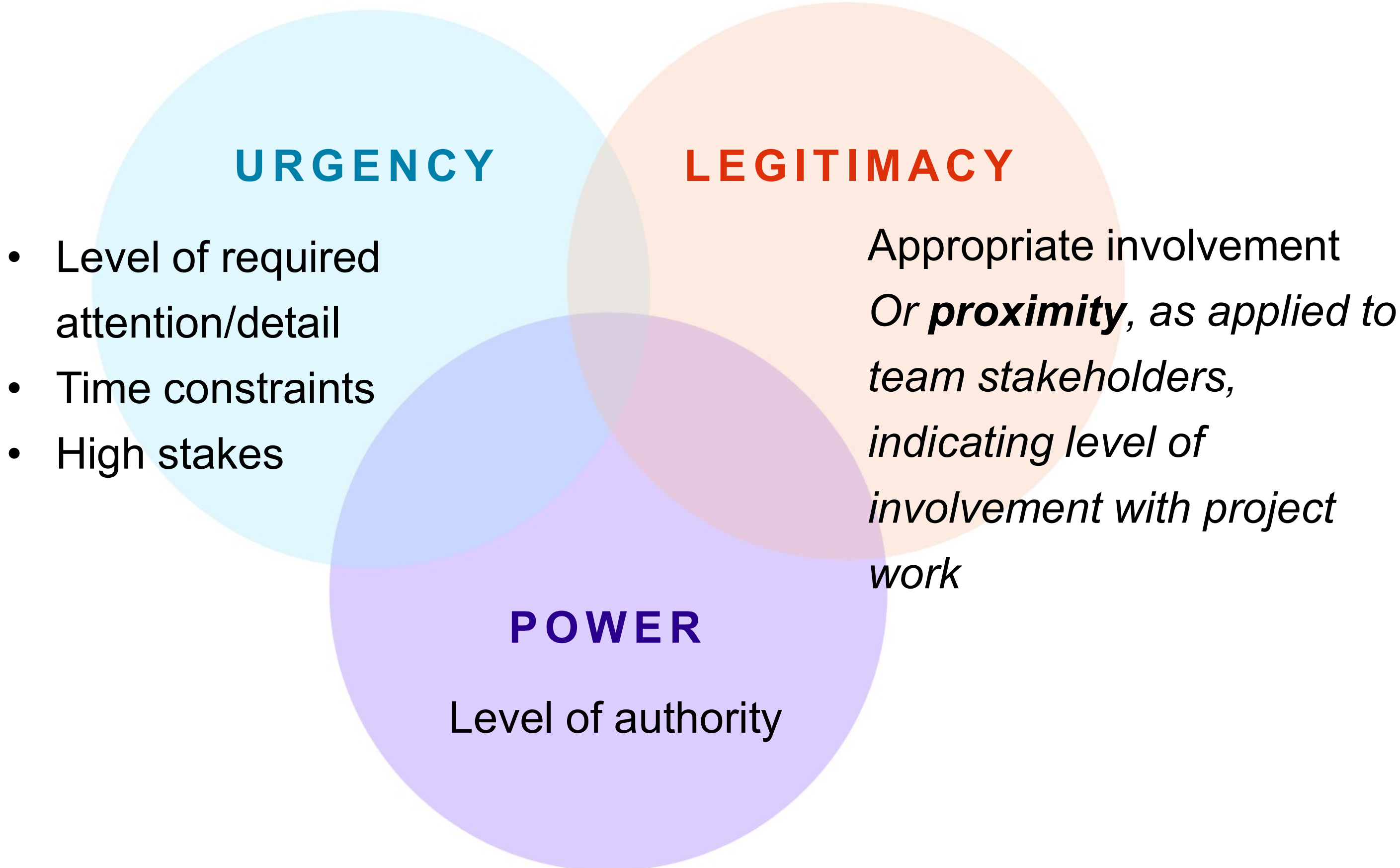
Directions of Influence

You should understand the social network of project stakeholders, specifically the direction of their influence on the project.

Upward	*Parent organization* — senior management (business, financial interests)
Downward	*In the project hierarchy* — team or specialists
Outward	*Have a "stake" in the project* — client, end-user, external
Sideward	*Friendly or competitive for resources* — project manager's peers, other organizational departments

Salience Model

*Focus on the **product owner** role. Are they familiar, interested and engaged enough with the project to make decisions and move the project forward?*



Stakeholder Perceptions

- Must be holistically understood in customer-centric project management approaches
- Can be damaging to a project, whether they are negative or positive

Why do you think it's important to understand both positive and negative stakeholder perceptions of your project?

Capture Stakeholder Feedback and Perceptions

- *Interpersonal skills*
- *Active listening*
- *Emotional intelligence*
- *Effective communication methods*

Key stakeholders

- Interview to understand **project requirements and vision** and **communication preferences**

All stakeholders

- Appropriate, regular project communications

Large and public groups

- Questionnaires/surveys
- Facilitated conversations/sessions — online or in person
- Digital media – email campaigns, websites, group chats
- Posters and advertising

Plan to Communicate with Stakeholders

Stakeholder engagement plan identifies required management strategies to effectively engage stakeholders.

Team fulfills strategies via communications described in the **communications management plan**.

Communication Requirements Analysis

- Leads to a clear articulation of the stakeholders' communications needs
- Enables effective choices about communication topics, frequency, models and technologies
- Output is a grid, questionnaire or survey that documents the communication and technology requirements for each stakeholder

Communication: Methods and Technologies

Do you use any other communication methods or techniques on your projects?

Are there types your organization does not allow? Why?

Meetings/verbal

- Physical (face to face)
- Virtual (videoconferencing)
- Phone call

Digital/electronic media

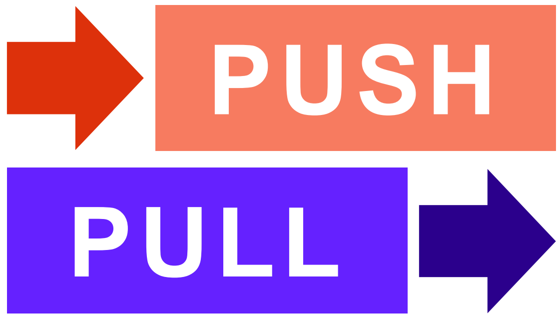
- Websites and social media
- Instant/text messaging via phone or platform
- Email or fax

Physical

- Body language and gestures
- White boards

KM0

Communication Methods



Push — sender determines:

- Send an email
- Make a phone call

Pull — receiver determines:

- Post information on team board
- Store reference documents in electronic repository — e.g., SharePoint

Interactive

- Conversation (speaking on the phone, virtual, in-person)
- Messaging
- Workshops/collaboration
- Whiteboarding

Agile teams are colocated whenever possible so that they can be highly collaborative.

KM0 [@Jeffrey Bachman] - got feedback from one of our ATPs that this slide could be clearer about "make a phone call". So would like to say here that making the phone call is a push from the sender, while speaking on the phone is interactive. So I added "phone" to the parenthetical list after 'Conversation'.
Kathryn Morris, 2023-05-26T15:00:26.160

KM0 0 I have also put a label on the right column "Interactive" to make it super clear that the info on that side of the slide is about interactive communication methods. I added "messaging" to this list.
Kathryn Morris, 2023-05-26T15:01:09.396

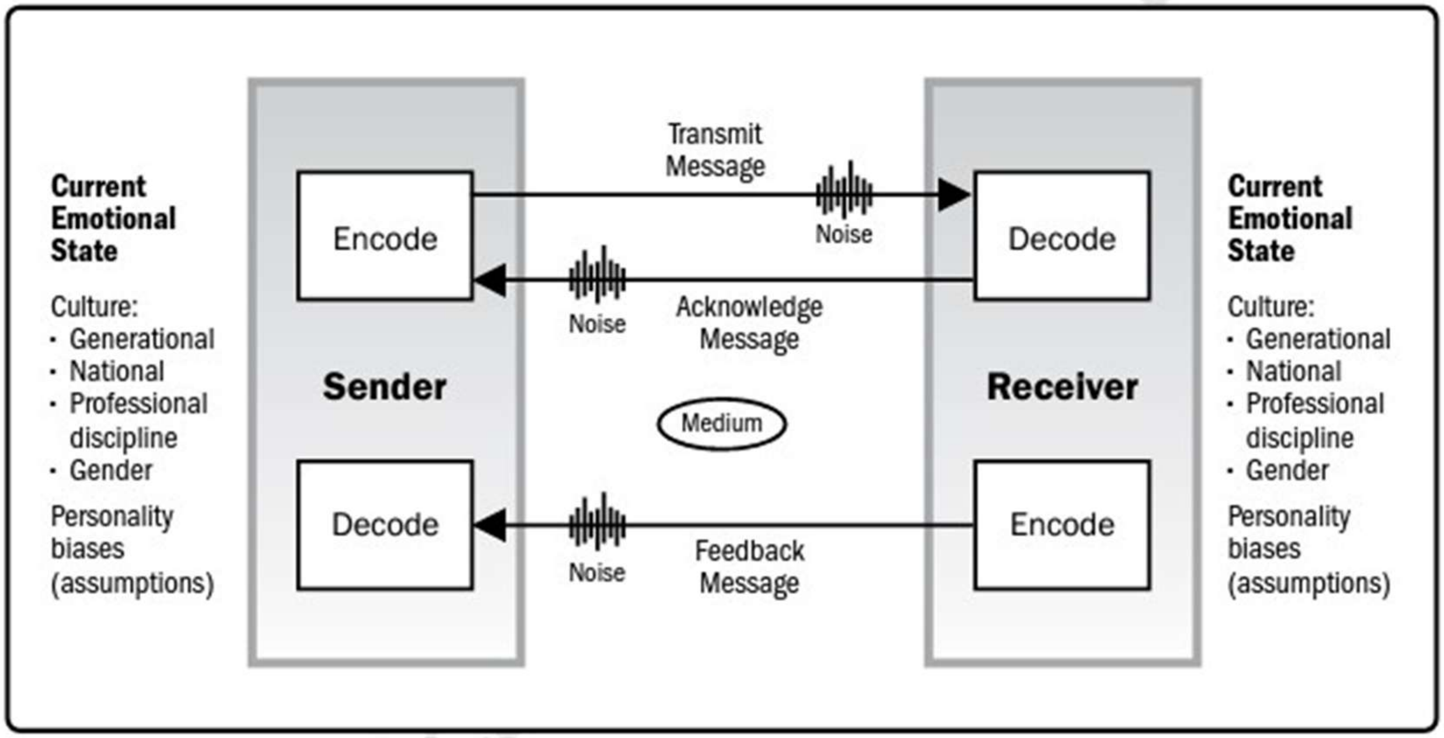
Communication Challenges / Considerations

- Urgency of need for information
- Availability and reliability of technology
- Ease of use
- Project environment – e.g., language and formality
- Sensitivity and confidentiality of information
- Communications OPAs — e.g., social media protocols
- Data protection laws/regulations
- Accessibility requirements

Communication Model*

Think of an example of a transmission. Depending on the method, what kinds of noise can play a part?

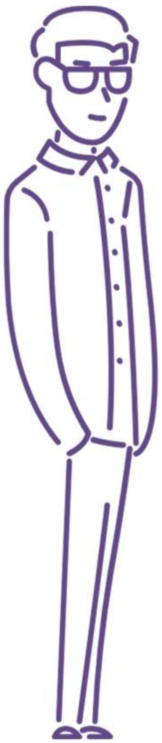
Cross-Cultural Communication Model



Stakeholder Engagement Strategy

- **Involve** stakeholders
- **Enable** appropriate management strategies
- **Create** and **maintain** relationships

Example Stakeholder Engagement Assessment Matrix (SEAM)



Tailor labels for stakeholder levels of engagement to your context, team or organization.

Don't use names on the matrix – refer to stakeholders by number.

Stakeholder	Unaware	Resistant	Neutral	Supportive	Leading
1				D	C
2				C	D
3			C	D	
4			C	D	
5		C	D		
6				C	D

C – Current engagement level | **D –** Desired engagement level

ECO Coverage

1.9 Collaborate with stakeholders

- Evaluate engagement needs for stakeholders (1.9.1)

2.4 Engage stakeholders

- Analyze stakeholders (power interest grid, influence, impact) (2.4.1)
- Categorize stakeholders (2.4.2)
- Develop, execute and validate a strategy for stakeholder engagement (2.4.4)

2.2 Manage communications

- Analyze communication needs of all stakeholders (2.2.1)
- Determine communication methods, channels, frequency and level of detail for all stakeholders (2.2.2)

Form the Team

TOPIC B

Create a Collaborative Team Culture

(Optional)

How do you think a collaborative team culture can be created in a hybrid approach? Give some examples!

Project manager:

- Builds team agreements, structures and processes that support a culture that enables individuals to work together and benefit from interactions
- Tailors a **resource management plan**

- The team assembles and self-organizes to support project requirements.

Project Team Formation
Video

Tuckman's Ladder of Team Development

Dr. Bruce Tuckman

Project Team Formation

Key Concepts

Self-organizing team: A **cross-functional team** in which people fluidly assume leadership as needed to achieve the team's objectives.

Servant leadership: The practice of leading the team by focusing on understanding and addressing the needs and development of team members in order to enable the highest possible team performance.

These concepts can be applied in any kind of project team.

Project Manager Role in Adaptive Teams

Leadership and management models:

- **Centralized:** All team members practice leadership activities and accountability is usually assigned to one individual, such as the project manager or similar role (**team lead**).

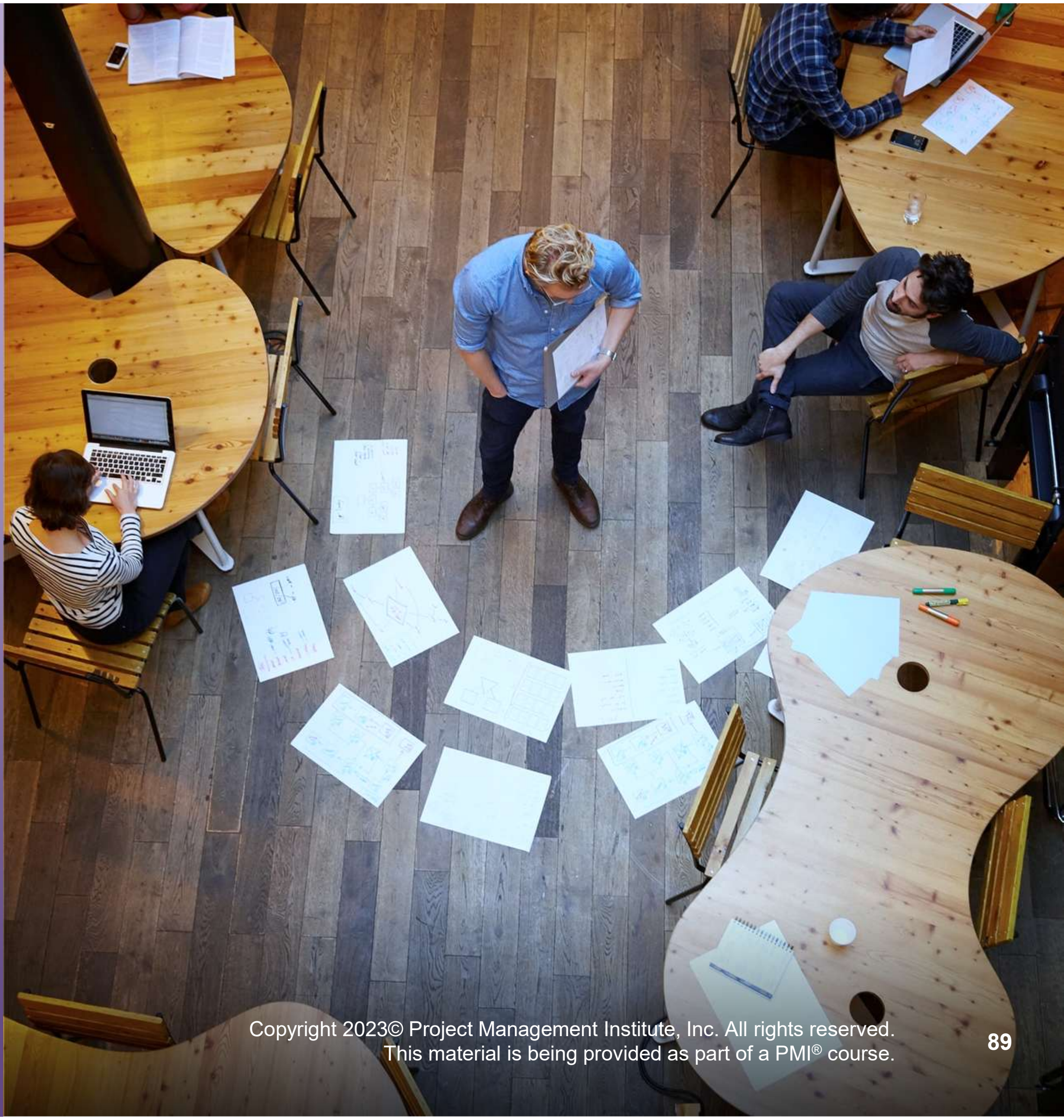
- **Distributed:** One project team member (may shift) serves as facilitator to enable communication, collaboration and engagement on accountable tasks.

If a team is self-organizing, is a project manager needed?

- *If not, which of these models works best?*
- *If yes, what does that role look like?*

Hybrid Team Formation
Example

Centralized coordination by a project manager or team lead and self-organized project teams for portions of the work



Project Team Composition

- Refers to team's makeup and how team members are brought together
- Varies based on organizational culture, location and scope
- Can be full-time or part-time members
- Includes varied knowledge and expertise — i.e., generalists and specialists

Project Team Roles

- Project management staff
- Project work staff
- Supporting experts
- Business partners

Identify Project Resource Requirements

Guidelines

Provision team members, external contractors and suppliers and physical and intangible assets:

- Ensure relevant skill sets
- Avoid single points of failure — e.g., a single resource has a required skill
- Create **cross-functional teams**
- Use **generalizing specialists,** or **T-shaped** people, whenever possible to support other areas of the project
- Ensure appropriate physical resources and other requirements — e.g., equipment and access rights

T-Shaped People and Self-Organizing Teams

- Provide individual value and versatility on project teams
- Lend flexibility to organizations
- Help avoid key resource shortages or work stoppages due to availability
- Train and coach team members to become T-shaped, combining **breadth** and **depth** of knowledge

Experts and Expert Judgment

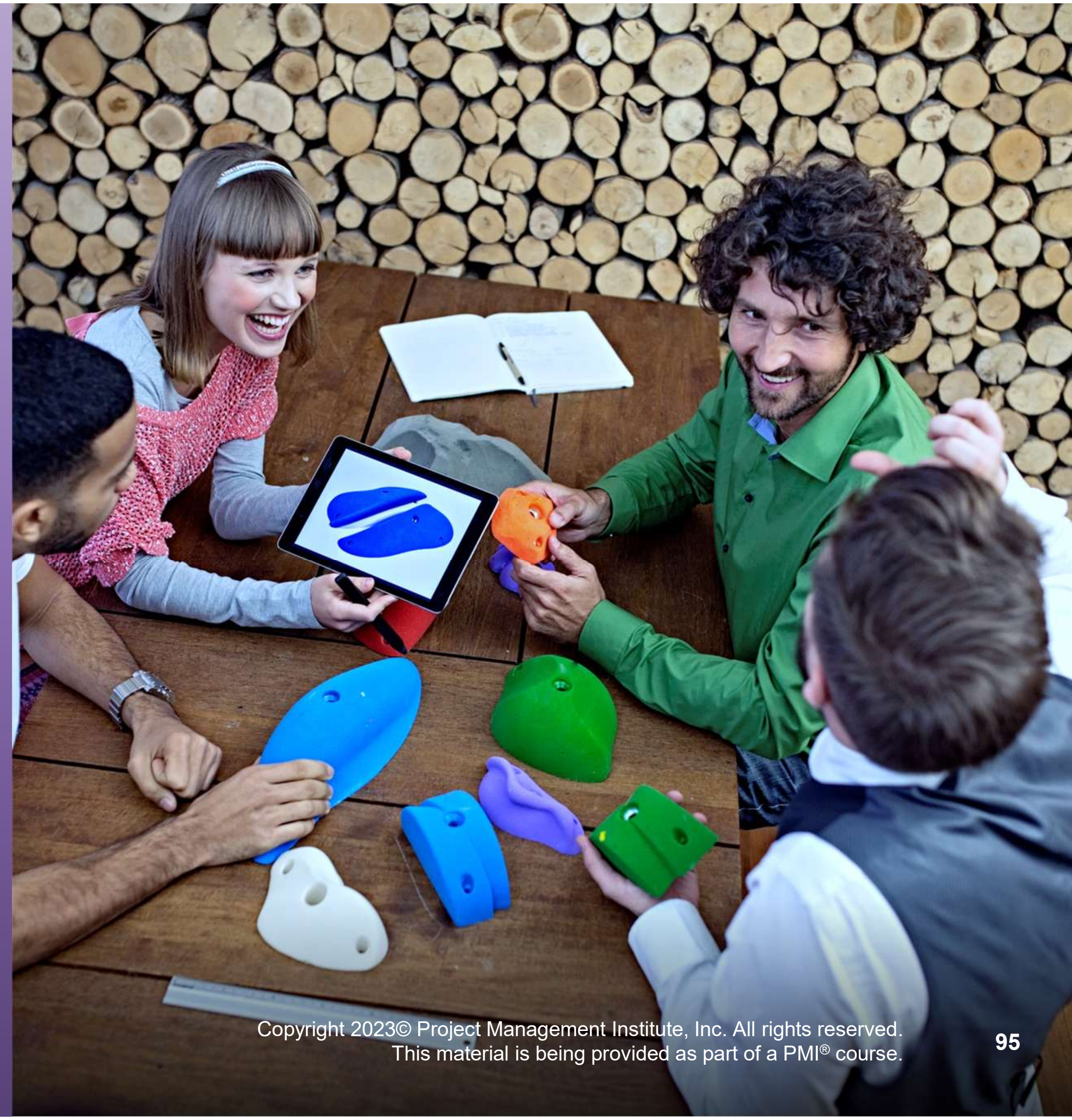
People from other areas of the organization

- Consultants
- Stakeholders
- Professional and technical associations
- Historical data
- Project manager

Focus on Team Strengths

- Organize around team **strengths**
- Be aware of **weaknesses**
- Identify **threats** to team success and **opportunities** to improve team performance

SWOT analysis



Team Norms

- Together, **establish** expected team behaviors **at the beginning of the project**
- Enable teams to **handle challenges** later
- Include guidelines and techniques for:
    - Meetings
    - Communications
    - Conflict management
    - Shared values
    - Decision-making
- Align team values with the *PMI Code of Ethics and Professional Conduct*

PMI®
Code of Ethics and Professional Conduct

Can you remember the four values that drive ethical conduct for the project management profession?

Team Charter* and Ground Rules*

- A document – electronic or paper, or a poster of the ground rules
- Created together with the team
- Includes:
  - Shared values
  - Behavior guidelines
  - Guidelines for communications and use of tools
  - Decision-making guidelines
  - Performance expectations
  - Conflict-resolution measures
  - Meeting time, frequency, and channel
  - Other team agreements — e.g., shared hours, improvement activities

Team Charter Example

SHAWPE
INDUSTRIES

PROJECT TEAM NAME: SHAWPE LIFESTYLE CENTRE
SPONSORING BUSINESS UNIT: EXECUTIVE / EUGENE LOWE
DURATION OF CHARTER: 36 MONTHS
 # OF PROJECT TEAM MEMBERS: 12
TEAM MEMBER TIME COMMITMENT: 40 HOURS PER WEEK

SCOPE OF WORK:
- Construct bespoke interior spaces appropriate for commercial tenants
- Restore historic buildings in site district for use as community spaces
- Recruit commercial and community tenants
- Create management structure and transfer to Oasestown Municipality partner

PROJECT TIMELINES AND KEY MILESTONES:

Milestone	Due Date	Measured By
PHASE 1	DEC 20XX	• Completion of interior spaces – obtain "safe occupancy" certificate • Recruit tenants
PHASE 2	DEC 20XX+1	• Tenants move in • Completion of outdoor spaces
PHASE 3	DEC 20XX +2	• Transferral of property management service

ADMINISTRATIVE/REPORTING REQUIREMENTS: All parties report directly to project manager

RESOURCES and BUDGET:

- Shawpe employees report to functional managers and project manager
- External contractors refer to SOW, report to project manager

PROJECT TEAM

Project manager: Ang Fen
Product owner: Helen Grey
TEAM MEMBERS:

- Daniel Ayan, Finance
- Greer Inniss, IT
- Janis Feather, Marketing
- Kareena Ayoung, Bus Dev
- Luis DeSouza, Executive
- Bei Jones, Marketing
- Solomon Grant, Marketing

SHAWPE
INDUSTRIES

- **Project Team Executive Sponsor Roles and Responsibilities:**
  - Guide the project team to fulfill goals
  - Ensure all team members are fully oriented about the project vision at kickoff meeting.
  - Work with the project manager to ensure group work is carried out.
- **Project Manager Roles and Responsibilities:**
  - Guide the team in accomplishing the purpose detailed in the charter and in accordance with company policies.
  - Keep the team focused.
  - Work toward building a sense of trust, productivity, and camaraderie within the group.
  - Support a forum for open discussion and sharing of ideas.
  - Address non- productivity within the group.
  - Make decisions to support accomplishing the objectives of the team.
  - Coordinate all administrative duties in support of the group.
  - Facilitate information gathering for meetings.
- **Project Team Member Roles and Responsibilities:**
  - Collaborate as a team to follow all process and procedures to complete the work of the team.
  - Ensure individual work for the team is carried out between meetings.
  - Collaborate with project manager and product owner on an as-needed basis.
  - Actively participate in team meetings.
- **Team Guidelines and Communication**
  - Working hours are 8am – 5pm for the office
  - On site working hours are posted on site and change daily; use security ID badges to enter site at any hour; hard hats and boots must be worn on site
  - Be polite
  - Respect everyone's opinion
  - Speak to people directly and appropriately before airing grievances in public
  - People may be contacted outside of working hours, but they are not required to respond
  - Use relevant messages in work chats
  - Be on time to meetings
  - Ask for help when you need it
  - Communicate honestly and openly
  - Use email for essential communication, so read emails properly

GROUND RULES

Team Communication

- **Effective communication** includes:
  - Verbal
  - Written
  - Behavioral
  - Physical (notice boards)
  - Virtual

- Include communication expectations and details in the **team charter**
- Organize communications:
  - Facilitate team and stakeholder collaboration Manage expectations
  - Check regularly to make sure it's working!
  - Plan and use **retrospectives** to discuss communications improvements

Colocated, Virtual or Both?

What kind of team are you on?

Virtual Team*

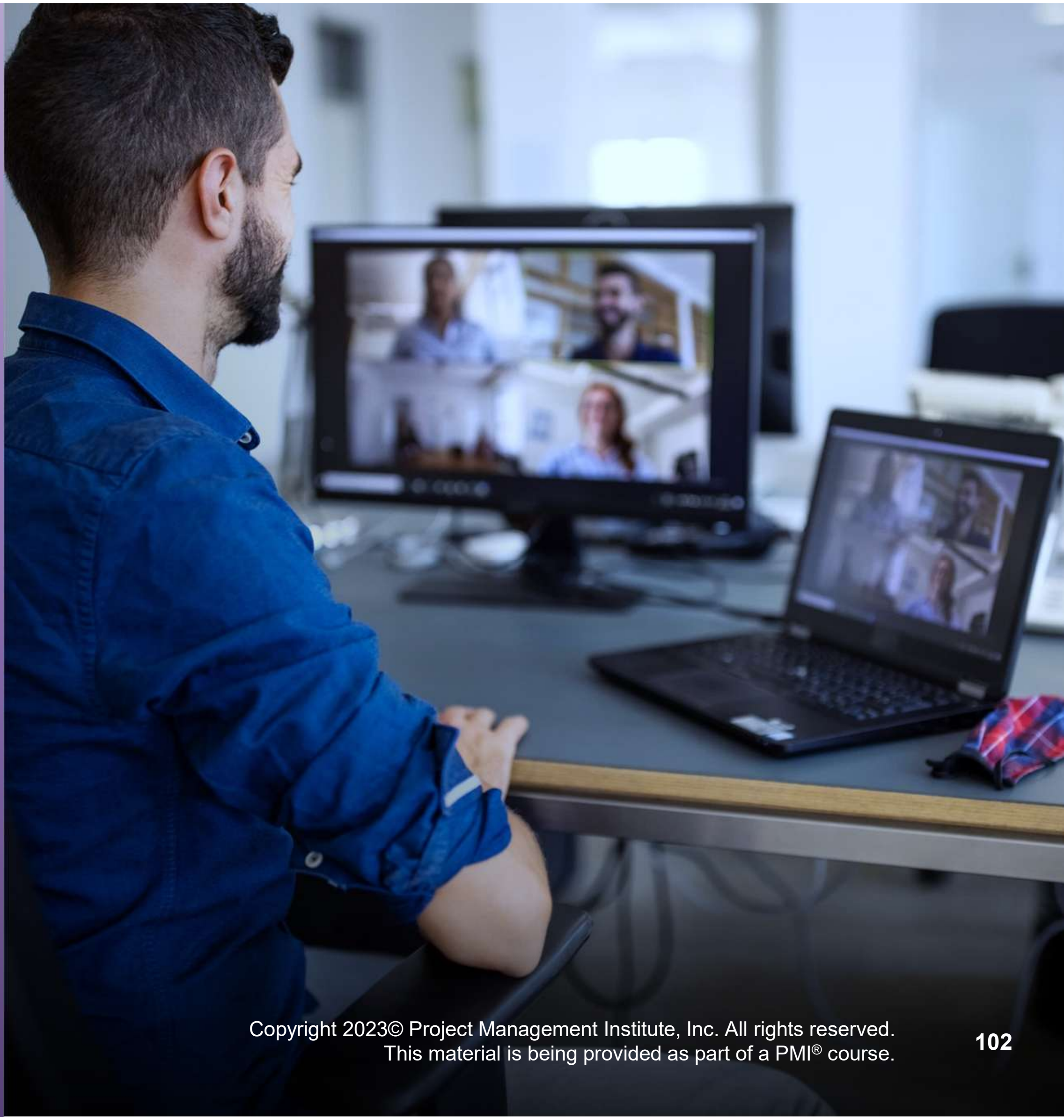
- "Normal" in most workplaces
- Create opportunities for the organization:
  - Better skills at lower costs
  - Avoids relocation expenses
  - Work/life balance
- Rely on communication technology
- May have bonding challenges

Colocated Team*

- Interaction is easy
- Better bonding is facilitated
- Use of physical tools, collaboration and boards possible

Virtual Team Challenges

- Individual performance tracking
- Diversity - language, technological skill
- Solo working prohibits bonding



Running Virtual Teams

- Check in with people individually as often as possible
- Conduct positive network-building activities

What are your tips for creating a positive virtual team experience?

Virtual Team Communication Technology

- Plan team communication and collaboration methods
- Consider working hours, geographical dispersion and security requirements
- Use appropriate tools:
  - Task boards
  - Messaging and chat
  - Calendars
  - Document storage
  - Knowledge repositories
  - Videoconferencing

Address Virtual Team Member Needs

Facilitate and ensure collaboration as a priority

Address the basic needs of a virtual team, including:

- Cohesion
- Shared goals
- Clear purpose
- Clarity on roles and expectations

ECO Coverage

1.4 Empower team members and stakeholders

- Organize around team strengths (1.4.1)

2.16 Ensure knowledge transfer for project continuity

- Discuss project responsibilities within team (2.16.1)
- Outline expectations for working environment (2.16.2)

1.11 Engage and support virtual teams

- Examine virtual team member needs (e.g., environment, geography, culture, global, etc.) (1.11.1)
- Investigate alternatives (e.g., communication tools, colocation) for virtual team member engagement (1.11.2)

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

skillsoft

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

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

0	1	2	3	4	5	6	7	8	9	10
○	○	○	○	○	○	○	○	○	○	○

Lesson 1 Vocabulary

CHANGE MANAGEMENT

A comprehensive, cyclic, and structured approach for transitioning individuals, groups, and organizations from a current state to a future state in which they realize desired benefits. It is different from project change control, which is a process whereby modifications to documents, deliverables, or baselines associated with the project are identified and documented, and then are approved or rejected.

THRESHOLD

A predetermined value of a measurable project variable that represents a limit that requires action to be taken if it is reached.

TOLERANCE

The quantified description of acceptable variation for a quality, risk, budget, or other project requirement.

ESCALATE

The act of seeking helpful intervention in response to a threat that is outside the scope of the project or beyond the project manager's authority.

PROJECT LIFE CYCLE

The series of phases that a project passes through from its start to its completion.

PHASE

Refers to a collection of activities within a project. Each project phase is goal oriented and ends at a milestone.

PHASE GATE

A point review at the end of a phase in which a decision is made to continue to the next phase, to continue with modification, or to end a project or program.

MINIMUM VIABLE PRODUCT (MVP)

The smallest collection of features that can be included in a product for customers to consider it functional. In Lean methodologies, it can be referred to as “bare bones” or “no frills” functionality.

SEQUENTIAL RELATIONSHIP

Refers to a consecutive relationship between phases; phases occur in procession and without overlap.

OVERLAPPING RELATIONSHIP

A type of phase-to-phase relationship characterized by phases that start prior to the ending of the previous phase. Therefore, activities in different phases run concurrently with one another.

QUALITY POLICY

The basic principles that should govern the organization's actions as it implements its system for quality management.

STAKEHOLDER

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, program or portfolio.

STAKEHOLDER ANALYSIS

A technique of systematically gathering and analyzing quantitative and qualitative information to determine whose interests should be considered throughout the project.

STAKEHOLDER REGISTER

A project document including the identification, assessment, and classification of project stakeholders.

STAKEHOLDER ENGAGEMENT PLAN

A component of the project management plan that identifies the strategies and actions required to promote productive involvement of stakeholders in project or program decision-making and execution. Used to understand stakeholder communication requirements and the level of stakeholder engagement in order to assess and adapt to the level of stakeholder participation in requirements activities.

COMMUNICATIONS MANAGEMENT PLAN

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 MODEL

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

CROSS-FUNCTIONAL TEAM

Teams that have all the capabilities to deliver the work they've been assigned. Team members can specialize in certain skills, but the team is capable of delivering what they've been called on to build. See also "self-organizing teams".

GENERALIZING SPECIALISTS

Refers to a project team member who has a particular area of deep expertise but also has experience in many other areas that may not be directly related to their core area. These team member types are valued on agile projects because of their ability to be interchangeable.

Lesson 1 Vocabulary

T-SHAPED

Refers to a person whose skill set comprises one area of specialization and broad ability in other skills required by the team.

Lesson 1 Vocabulary

TEAM CHARTER

A document that records the team values, agreements, and operating guidelines as well as establishes clear expectations regarding acceptable behavior by project team members.

Lesson 1 Vocabulary

GROUND RULES

Expectations regarding acceptable behavior by project team members.

VIRTUAL TEAM

A group of people with a shared goal who fulfill their roles with little or no time spent meeting face-to-face.

Lesson 1 Vocabulary

COLOCATION

An organizational placement strategy in which the project team members are physically located close to one another to improve communication, working relationships, and productivity.