

# PMP Exam Qualifications

---

HOW TO QUALIFY FOR THE PMP EXAM

# PMP Requirements

---



Complete application on-line

Eligibility letter from PMI

1 year from eligibility letter

Can take 3 times within one year, then wait one year to reapply

# PMP Qualifications: With a Degree

Bachelor's degree or global equivalent



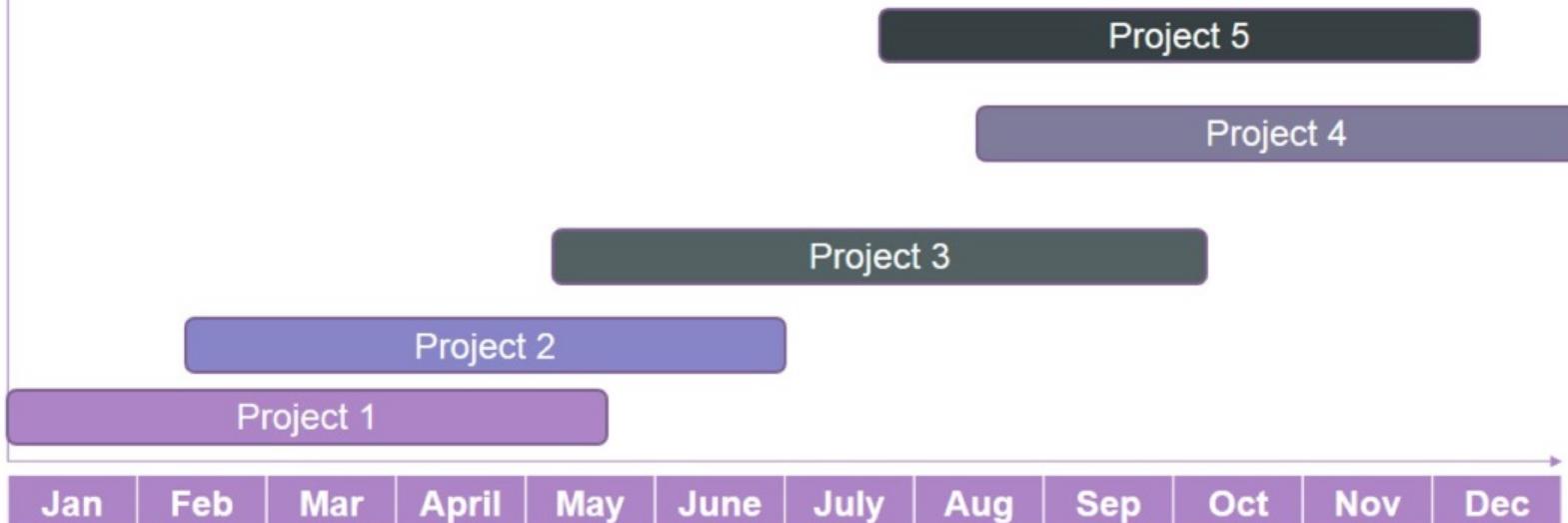
# PMP Qualifications: Without a Degree

High school diploma or global equivalent



# Unique Months of Experience

---



With a degree: 36 non-overlapping months

Otherwise: 60 non-overlapping months



# PMP Exam Fees

---

\$405 per PMI member; €340

\$555 per non-PMI member; €465

\$129 to join PMI + \$10 application fee; €105 + €10

# After the PMP

Celebrate

Earning PDUs

Share your story



# PMP Exam Qualifications

---

HOW TO QUALIFY FOR THE PMP EXAM

# PMP Requirements

---



Complete application on-line

Eligibility letter from PMI

1 year from eligibility letter

Can take 3 times within one year, then wait one year to reapply

# PMP Qualifications: With a Degree

Bachelor's degree or global equivalent



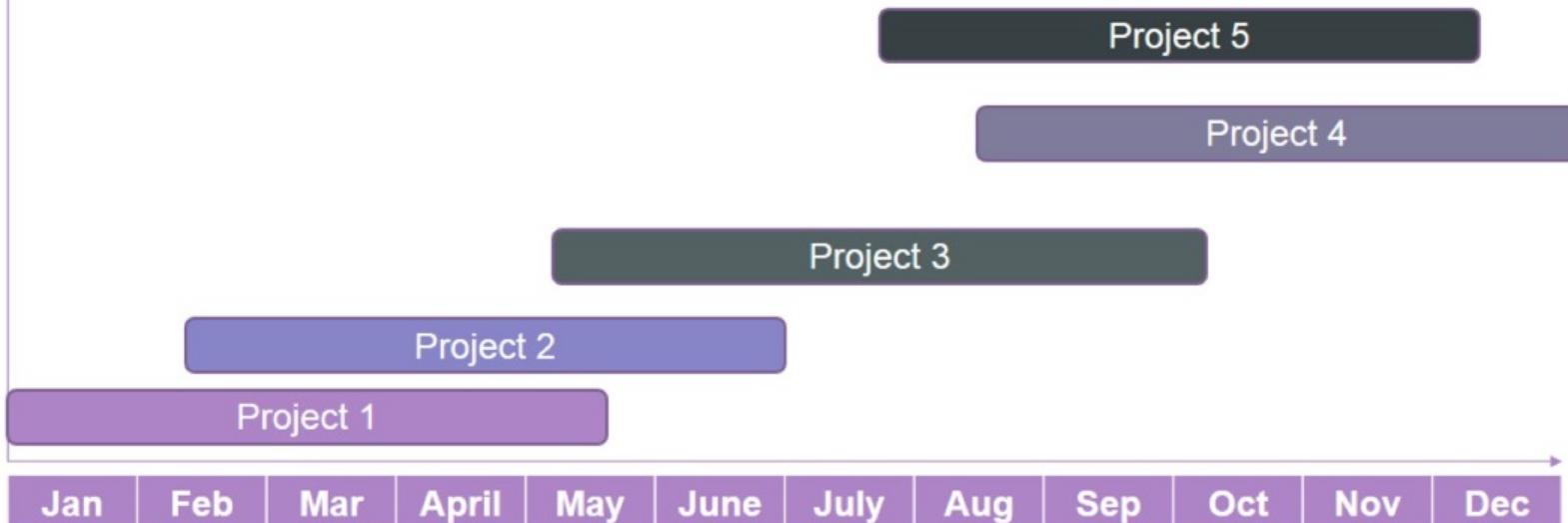
# PMP Qualifications: Without a Degree

High school diploma or global equivalent



# Unique Months of Experience

---



With a degree: 36 non-overlapping months

Otherwise: 60 non-overlapping months



# PMP Exam Fees

---

\$405 per PMI member; €340

\$555 per non-PMI member; €465

\$129 to join PMI + \$10 application fee; €105 + €10

# After the PMP

Celebrate

Earning PDUs

Share your story





# Audits are Random

---

You can't avoid the chance of an audit

It's random – not profiling

It's a small chance that you'll be audited

# PMP Exam Details

---



200  
questions  
total

175 count  
towards  
score

25  
questions  
are seeded

Four hours  
to complete  
the exam



# Test Details

---

Nothing into Prometric testing room

Six sheets of paper or white board

Two pencils or dry-erase marker

Questions are based on project management titles,  
which include but are not limited to PMI's global standards

No "brain dump" until timer starts

# Navigating PMP Exam

---



Tutorial explains software usage

Move forwards and backwards

Mark questions for review

Strike out answers

Highlight text

Blank answers are scored as incorrect

# Exam Domain: Initiating – 13 percent

---

26 questions

Conduct project selection methods

Define the scope

Document project risks, assumptions, and constraints

Identify and perform stakeholder analysis

Develop the project charter

Obtain project charter approval

# Exam Domain: Planning – 24 percent

---

48 questions

Define and record requirements, constraints, and assumptions

Create the Work Breakdown Structure (WBS)

Create a budget plan

Develop the project schedule and timeline

Create the human resource management plan

# Exam Domain: Planning – 24 percent

---

Create the communications plan

Develop the project's procurement management plan

Establish the project's quality management plan

Define the change management plan

Create the project risk management plan

Present the project management plan to the key stakeholders

Host the project kickoff meeting

# Exam Domain: Executing – 31 percent

---

62 questions

Manage project resources for project execution

Enforce the quality management plan

Implement approved changes as directed by the change management plan

Execute the risk management plan to manage and respond to risk events

Develop the project team through mentoring, coach, and motivation

# Exam Domain: Monitoring and Controlling – 25 percent

---

50 questions

Measure project performance

Verify and manage changes to the project

Ensure project deliverables conform to quality standards

Monitor all risks and update the risk register

Review corrective actions and assess issues

Manage project communications to ensure stakeholder engagement

# Exam Domain: Closing – 7 percent

---

14 questions

Obtain final acceptance for the project

Perform operational transfer of the project deliverables

Ensure financial, legal, and administrative project closure

Create and distribute the final project report

Archive and retain project records

Measure customer satisfaction

# Completing the Exam Application

---

WALK-THROUGH OF EXAM APPLICATION

# Complete the Application Online

---

[www.pmi.org](http://www.pmi.org)

Can start, stop, and save your application

Complete the application ASAP – don't wait!

# Study What's Important

---



Initiating – 13 percent

Planning – 24 percent

Executing – 31 percent

Monitoring and Controlling – 25 percent

Closing – 7 percent

# Purpose of the *PMBOK Guide*

- Generally recognized approach to project management
- Describes good practice for project management
- Common lexicon of project management terms
- Fundamental for PMI Exams:
  - PMP
  - CAPM
  - PgMP
  - PMI-ACP
  - PMI-RMP
  - PMI-SP

# All About the *PMBOK Guide*

- A *Guide to the Project Management Body of Knowledge*
- PMP exam and the *PMBOK Guide*
- Five process groups
- 49 processes
- Ten knowledge areas

# *PMBOK Guide Chapters*

1

Introduction

2

Environments in which projects operate

3

Role of the project manager

4

Integration management

# *PMBOK Guide Chapters*

5

Scope management

6

Schedule management

7

Cost management

8

Quality management

# *PMBOK Guide Chapters*

9

Resource management

10

Communications management

11

Risk management

12

Procurement management

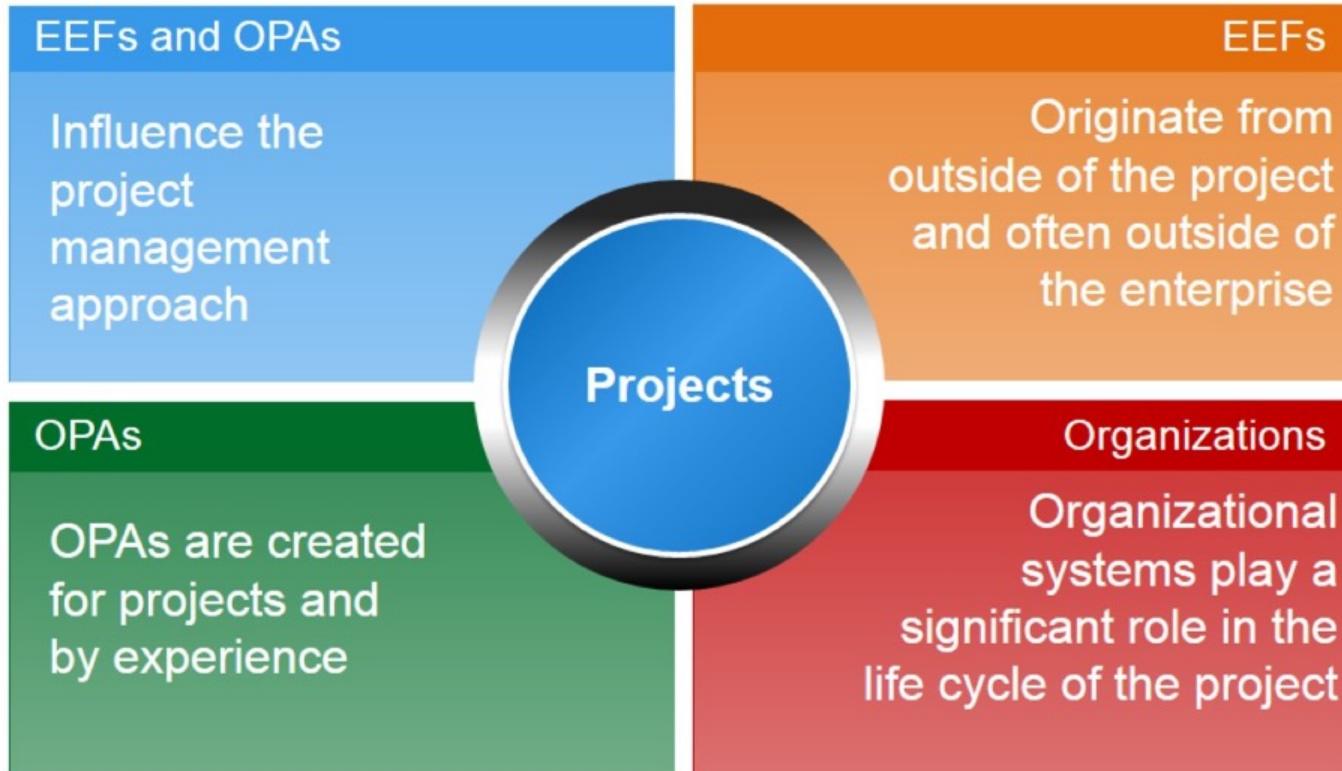
13

Stakeholder management

# Environments in Which Projects Operate

- Enterprise environmental factors
- Organizational process assets
- Organizational Systems

# EEFs and OPAs and Organizational Systems



# **Enterprise Environmental Factors**

---

- Enterprise environmental factors
  - Internal to the organization
  - External to the organization





# Organizational Process Assets

---

- Processes, policies, and procedures
- Organizational knowledge repositories

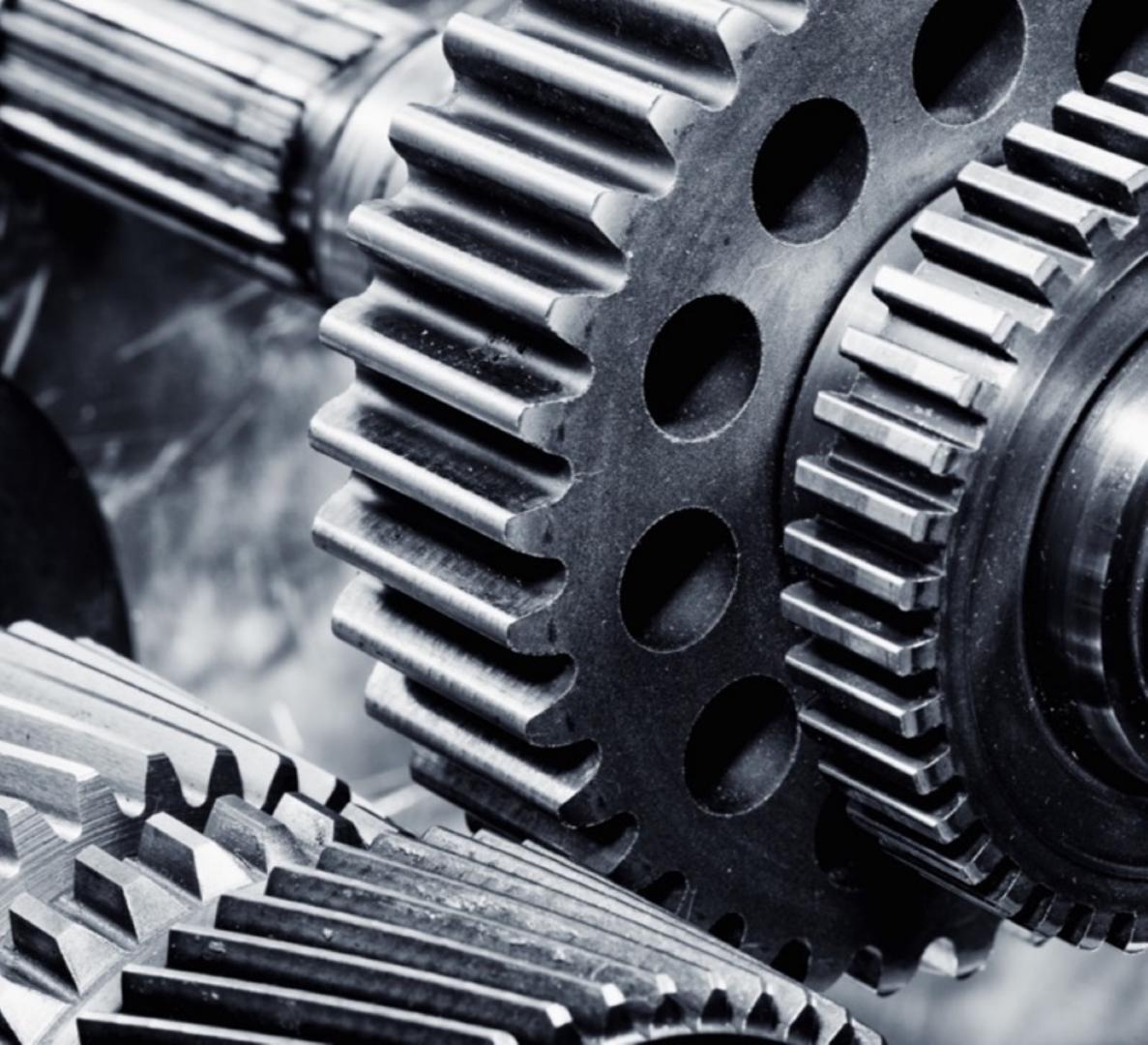
# **Organizational Systems**

- Governance frameworks
- Management elements
- Organizational structures



# **Project Integration Management**

- Develop project charter
- Develop project management plan
- Direct and manage project work
- Manage project knowledge
- Monitor and control project work
- Perform integrated change control
- Close project or phase



A photograph showing architectural blueprints and a calculator resting on a desk. In the background, a large building under construction is visible against a blue sky with clouds.

# Project Scope Management

---

- Plan scope management
- Collect requirements
- Define scope
- Create WBS
- Validate scope
- Control scope

# Project Schedule Management

- Plan schedule management
- Define activities
- Sequence activities
- Estimate activity durations
- Develop schedule
- Control schedule





# Project Cost Management

- Plan cost management
- Estimate costs
- Determine budget
- Control costs

# **Project Quality Management**

- Plan quality management
- Manage quality
- Control quality





# Project Resources Management

---

- Plan resource management
- Estimate activity resources
- Acquire resources
- Develop team
- Manage team
- Control resources

# **Project Communications Management**

- Plan communications management
- Manage communications
- Monitor communications



# Project Risk Management

- Plan risk management
- Identify risks
- Perform qualitative risk analysis
- Perform quantitative risk analysis
- Plan risk responses
- Implement risk responses
- Monitor risks



# Project Procurement Management

- Plan procurement management
- Conduct procurements
- Control procurements



# **Project Stakeholder Management**

- Identify stakeholders
- Plan stakeholder engagement
- Manage stakeholder engagement
- Monitor stakeholder engagement



# What is a Project?

Temporary endeavor

- Definite beginning and end

Creates a unique product, service, or result

Projects can involve:

- A single person
- A single organizational unit
- Multiple organizational units



# Projects Create...

---

An item, an enhancement, or a component of another item

Service or capability to perform a service

Improvement in an existing item

Result – outcome or document

Combination of services and results

# Projects are Temporary

---

Temporary doesn't mean short-duration

Projects end when:

- Objectives met
- Objectives cannot or will not be met
- Funds are depleted
- Need no longer exists
- Resources are no longer available
- Legalities or convenience terminates the project



# Project Drive Change

Changing from current state to future state

Could have a transition state as the project moves to future state





# Projects Enable Business Value Creation

Business value means benefits for the organization and stakeholders

Tangible business value:

- Monetary assets
- Stockholder equity
- Fixtures and tools
- Market share

Intangible business value:

- Goodwill and reputation
- Brand recognition
- Public benefit
- Trademarks
- Strategic alignment

# Project Initiation Context

## Why Projects are Created

---

01

Regulatory,  
legal, or social  
requirements

02

Stakeholder  
requests

03

Technological  
advances

04

Create, improve,  
or fix products,  
processes, or  
services



# What is Project Management?

---

Application of knowledge, skills, tools, and techniques to meet the project requirements

49 project management processes

Five project management process groups

- Initiating
- Planning
- Executing
- Monitoring and Controlling
- Closing

# Typical Project Management

---

Identifying requirements

Addressing needs, concerns, and expectations of stakeholders

Setting up, maintaining, and carrying out communications

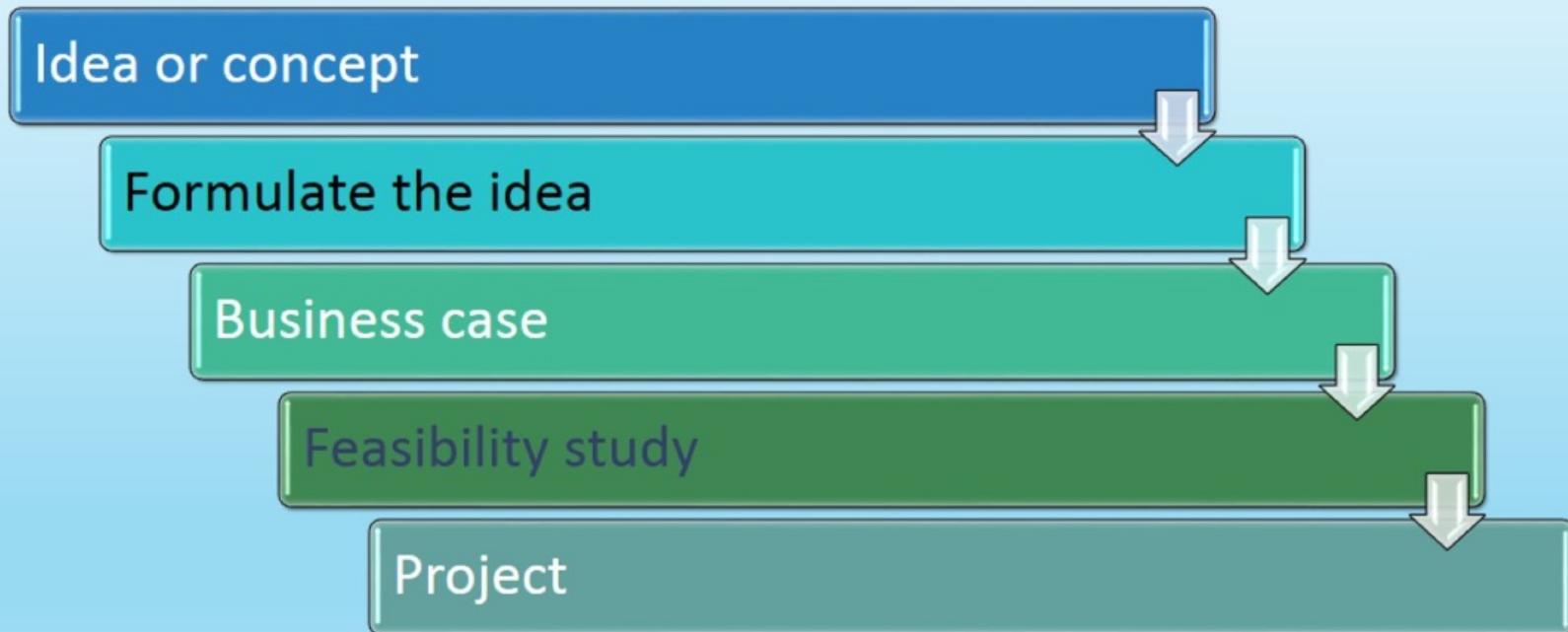
Managing stakeholders

Balancing competing project constraints:

- Scope
- Quality
- Schedule
- Budget
- Resources
- Risks

# Progressive Elaboration

---



# Project Management Application Areas

---



Construction



Health care



Government



Information technology

# Program Management

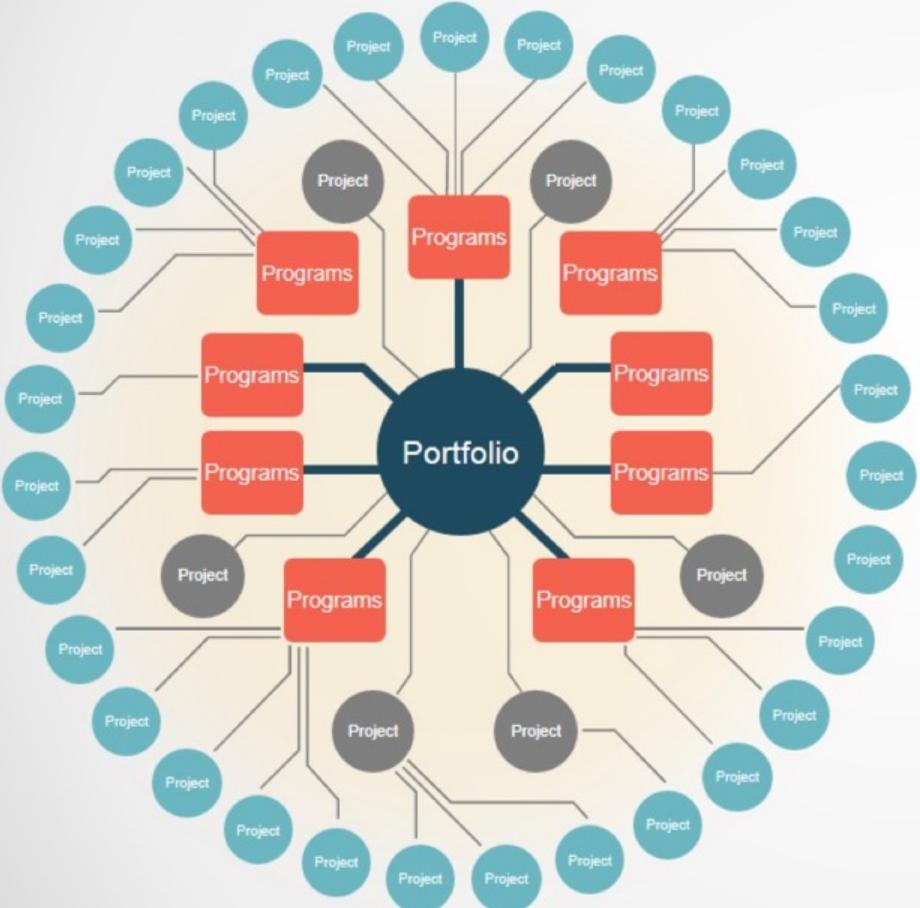
- Multiple related projects
- Achieve benefits
- Program managers and project managers
- PgMP

## Portfolio Management, Program Management, Project Management, and Organizational Project Management

- Considerations include:
  - Scope
  - Change
  - Planning
  - Management
  - Success factors
  - Monitoring
- Portfolios are about maximizing return on investment



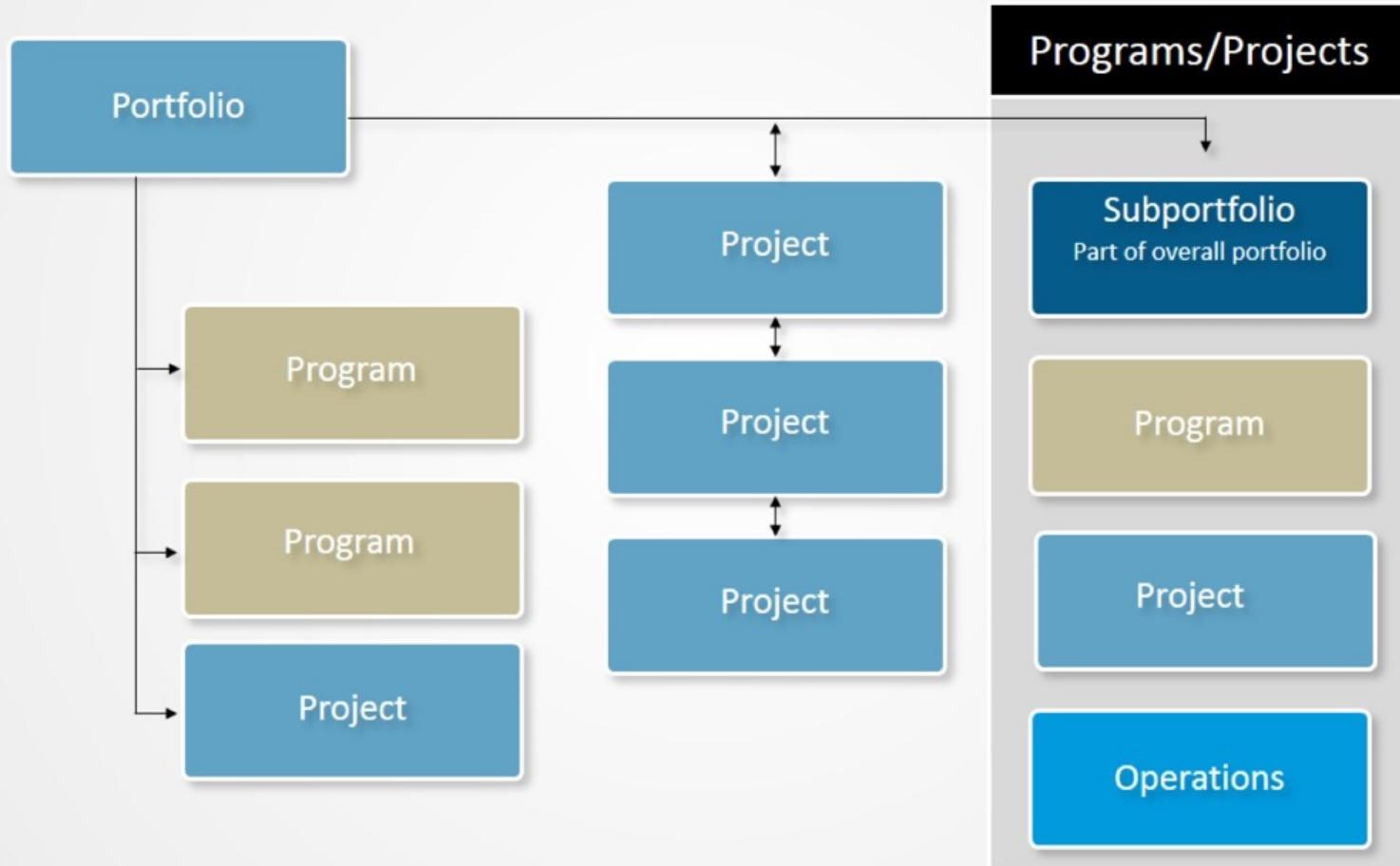
# Portfolios, Programs, and Projects



Management and oversight:

- Scope
- Changes
- Planning
- Management
- Success
- Monitoring

# Organizational Portfolio



# Project Management Offices

- Support project managers
- Manage shared resources across the PMO
- Coaching, mentoring, and training
- Conducting project audits
- Developing and managing processes and procedures
- Facilitating communications across projects



# Project Management Office Types

- Supportive – consultative role, templates, training
- Controlling – compliance through a framework, specific forms and templates, governance
- Directive – directly manages the project as the PMO owns and controls the project life cycle

# Projects and Operations

## Projects are temporary

- Developing new products or services
- Moving, Adding, Changing, or Deleting
- Implementing new service or solution

## Operations are ongoing

- Repetitive actions
- Maintenance
- Core business functions

# OPM and Strategies

- Organizational project management
- Coordinate, manage, and control projects, programs, and portfolio management in a uniform, consistent effort
- Consistently deliver better

# Organizational Project Management Facts



# Projects and Strategic Planning



# Organizations and Project Management

- Project-based organizations
- Project management and organizational governance
- Projects and organizational strategy
- Culture

# Understanding the Project Environment

- Physical location
- Factors that influence the project



# Physical environmental elements

- Location of the project work
- Working conditions
- Weather
- Constraints
- External enterprise environmental factors

# Social and Cultural Influences

- Political climate
- Codes of conduct
- Ethics
- Perceptions
- Values
- External enterprise environmental factors

# Organizational Culture and Structure

- Vision
- Mission
- Values and beliefs
- Cultural norms
- Hierarchy and authority
- Organizational and management style
- Internal enterprise environmental factor



# Infrastructure Environmental Factor

- Facilities
- Equipment
- Telecommunication channels
- IT hardware and usability
- Internal enterprise environmental factor

# Initiating Process Group

---

Two processes:

- Develop project charter
- Identify stakeholders

13 percent of PMP exam  
questions  
26 questions



1

# Planning Process Group

---

24 processes:

- Develop project management plan
- Plan scope management
- Collect requirements
- Define scope
- Create work breakdown structure
- Plan schedule management
- Define activities

24 percent of PMP exam  
questions  
48 questions



2

# Planning Process Group

---

24 processes, continued:

- Sequence activities
- Estimate activity resources
- Estimate activity durations
- Develop schedule
- Plan cost management
- Estimate costs
- Determine budget

24 percent of PMP exam  
questions  
48 questions



2

# Planning Process Group

---

24 processes, continued:

- Plan quality management
- Estimate activity resources
- Plan communications
- Plan risk management
- Identify risks
- Perform qualitative analysis
- Perform quantitative analysis

24 percent of PMP exam  
questions  
48 questions



2

# Planning Process Group

---

24 processes, continued:

- Plan risk responses
- Plan procurement management
- Plan stakeholder management

24 percent of PMP exam  
questions  
48 questions



2

# Executing Process Group

---

Ten processes

- Direct and manage project work
- Manage project knowledge
- Manage quality
- Acquire resources
- Develop project team
- Manage project team
- Manage communications
- Implement risk response
- Conduct procurements
- Manage stakeholder engagement

31 percent of PMP exam  
questions  
82 questions



3

# Monitoring and Controlling Process Group

---

12 processes

- Monitor and control project work
- Integrated change control
- Validate scope
- Control scope
- Control schedule
- Control costs

25 percent of PMP exam  
questions  
50 questions



4

# Monitoring and Controlling Process Group

---

11 processes, continued

- Control quality
- Control resources
- Monitor communications
- Monitor risks
- Control procurements
- Monitor stakeholder engagement

25 percent of PMP exam  
questions  
50 questions



4

# Closing Process Group

---

One process

- Close project or phase

7 percent of PMP exam  
questions  
14 questions



5

# Work Performance Data

- Raw data and facts about project work
- Status of project work assignments
  - Percent complete
  - In progress
  - Start and finish dates
- Data can include:
  - Cost of the activities
  - Number of change requests
  - Defects
  - Durations

# Work Performance Information

- Analyzed work performance data
- Useable information to make decisions
- Status to actionable results

# Work Performance Reports

- Work performance information in communicable formatting
- Status reports
- Memos
- Dashboards
- Project updates
- Helps stakeholders make decisions

**01**

Choose what processes should be used on a project

**02**

What depth the processes should be used

**03**

Not every process is needed on every project

**04**

The larger the project, the more processes are likely needed

## Tailoring the Processes

# Tailoring and the *PMBOK Guide*

01

Knowledge  
areas

02

Processes

03

Tailor to fit  
your project

04

Includes an  
overview of  
tailoring  
throughout

# Predictive Life Cycles

- Plan-driven
- Waterfall approach
- Predicts the project life cycle
- Changes to scope are tightly controlled



# Iterative and Incremental Life Cycles

---

- Phases repeat through iterations
- Iterations create deliverables
- Detailed scope is elaborated for each iteration
- Changes to the project scope are expected



A screenshot of a code editor window titled "Reindeer" showing a file named "UploadProcess.php". The code is written in PHP and handles file uploads. It includes logic to check if files are uploaded, handle presentation files, and insert data into a database. The code uses MySQL syntax for inserting data into a table named "file".

```
if (!is_uploaded_file($_FILES['file']['tmp_name'])) {
    $err_error = 'error';
    $err_as[2] = file_get_contents('error.html');
} else {
    $arrPresentationFiles = array();
    $arrReportFiles = array();
    $arrModelFiles = array();
    $arrMedia = new media();
}

if (!is_array($application_members)) {
    $serial_application_members = serialize($application_members);
}

if (!is_uploaded_file($_FILES['file'])) {
    //check_file#application_presentation_file
    foreach ($application_presentation_file as $file) {
        $extension = $media->mediatype($file['name']);
        $doctype = $media->doctype($file['name']);
        $ext = strtolower(substr($extension, -3));
        $file_name = str_replace('application_code', '', $file['name']);
        move_uploaded_file($file['tmp_name'], $file_name);
    }
}

$sql = "INSERT INTO
        ".DB_PREFIX . "file
    (
        file_id,
        file_name,
        file_size,
        file_size_type,
        file_type,
        file_path,
        file_date,
        file_update,
        file_author
    ) VALUES (
        '4005200',
        'animation',
        '$file_name',
        'image',
        NOW(),
        '$file'
    )";

```

## 2.4.2.4 Adaptive Life Cycles

- Change-driven
- Agile project management
- Rapid iterations or project work
- Backlog of requirements
- Changes to the project scope are expected



# Introducing Business Documents

- Project business case
- Project charter
- Project management plan
- Benefits management plan

# Business Documents for Project Performance

- Phase gates within the project
- Actual performance compared to business documents
- Decisions of comparison include:
  - Continue to the next phase,
  - Continue to the next phase with modification,
  - End the project,
  - Remain in the phase, or
  - Repeat the phase or elements of it.

# Project Business Case

- Economic feasibility study
- Validity of benefits the project will create
- Future project management decisions and actions
- Maintained throughout the project

# Project Business Case

- Project sponsor accountable for the development and maintenance
- Project manager responsible for providing recommendations
- Business case could be at the program level

# Business Case: Business Needs

- What is prompting the need for action
- Statement documenting the business problem or opportunity to be addressed including the value
- Stakeholders affected
- Identification of the scope

# Business Case: Project Determination

- Organizational strategies, goals, and objectives;
- Root cause or contributors of an opportunity
- Gap analysis of capabilities
- Known risks
- Critical success factors
- Decision criteria

# Analysis of a Situation

01

Required

To be fulfilled to  
address the  
problem or  
opportunity

02

Desired

To address the  
problem or  
opportunity

03

Optional

Not essential



# Recommendation for a Project

---

- Do nothing - “business as usual” option
- Do the minimum work possible
- Do more than the minimum work possible

# Project Benefits Management Plan

- A benefit is a project outcome that provides value to the organization and the project beneficiaries
- Document used to define:
  - Create the project benefits
  - Maximize the project benefits
  - Sustain the project benefits

# Project Benefits Management Plan

- Target benefits – such as expected tangible and intangible value
- Strategic alignment – the project benefits align to the business strategies
- Timeframe - benefits by phase, short-term, long-term, and ongoing

# Project Benefits Management Plan

- Metrics – the measures to be used to show benefits realized, direct measures, and indirect measures
- Assumptions – the factors expected to be in place or to be in evidence
- Risks – the risks for realization of benefits

# Organizational Governance Frameworks

01

Governance  
defines what you  
can and cannot  
do in an  
organization

02

How you operate  
within a system

03

Framework is the  
organizational  
structure

# Governance Framework

- Rules and organization policies
- Procedures for activities
- Cultural norms
- Systems and processes
- Framework influences how:
  - Objectives are set and achieved
  - Risk is monitored and assessed
  - Performance is optimized

# Governance: Portfolios, Programs, Projects

- Common governance shared among all endeavors
  - Alignment
  - Risk
  - Performance
  - Communications
- Each organization must create and tailor governance

# Management Elements of Governance

- Division of work
- Authority to perform work
- Responsibility to perform work
- Discipline of action
- Unity of command
- Unity of direction
- Organization goals take precedence over individual goals
- Paid fairly
- Optimal use of resources

# Management Elements of Governance

- Clear communication channels
- Right materials to the right person for the right job at the right time
- Fair and equal treatment of people in the workplace
- Clear security of work positions
- Safety of people in the workplace
- Open contribution to planning and execution by each person
- Optimal morale

# Organic (Simple) Structure

- Work groups within the organization are flexible
- People work alongside one another regardless of their roles in the organization
- Project manager may have little to no authority over the project resources
- Resources dedicated to the project are low
- Owner of the organization will be the individual in charge of the budget
- Unlikely that there'll be any administrative staff to help the project manager

# Functional Organizations

- Sometimes called centralized organizations
- Clear division of business units
- Project managers in a functional organization:
  - Little authority and little autonomy
  - Report to a functional manager
  - Project coordinators or team leaders
  - Part-time role
  - Little or no administrative staff
  - Functional manager manages the project budget

# Multidivisional Structures

- Replication of functions for each division
- Similar to the functional organization
- Project manager will have little authority
- Project coordinator
- Resources for the project will be part time
- Could a part-time administrative staff
- Functional manager manages project budget

# Weak Matrix

- Team has a blend of departmental and project duties
- Project manager:
  - Limited authority
  - Management of a part-time project team
  - Part time
  - Project coordinator or team leader
  - Part-time administrative staff
- Functional manager manages the project budget

# Balanced Matrix

- Project manager:
  - Low to moderate amount of authority
  - Management of a part-time project team
  - Part-time role as a project manager
  - May have part-time administrative staff to help expedite the project
- Project manager and functional manager share management of the project budget

# Strong Matrix

- Project manager:
  - Moderate to high level of power
  - Management of a part-time to nearly full-time project team
  - Full-time role as a project manager
  - Full-time administrative staff to help expedite the project
- Project manager manages the project budget

# Project-Oriented

- Groups employees, collocated or not, by activities on a project
- Project manager:
  - Complete, or close to complete, power
  - High level of autonomy over projects
  - Work full-time on the project with their team
  - A full-time administrative staff
  - Manages the budget

# Virtual Organization

- Utilizes a network structure within the organization
- Points of contact represent the different departments
- Communication can be a challenge
- Project manager has low authority over the project team
- Shares authority over the project budget with the functional manager.
- Project manager could be full time or part time
- Project team members are likely to be part time
- Administrative staff for the project could be part time or full time

# Hybrid Organizations

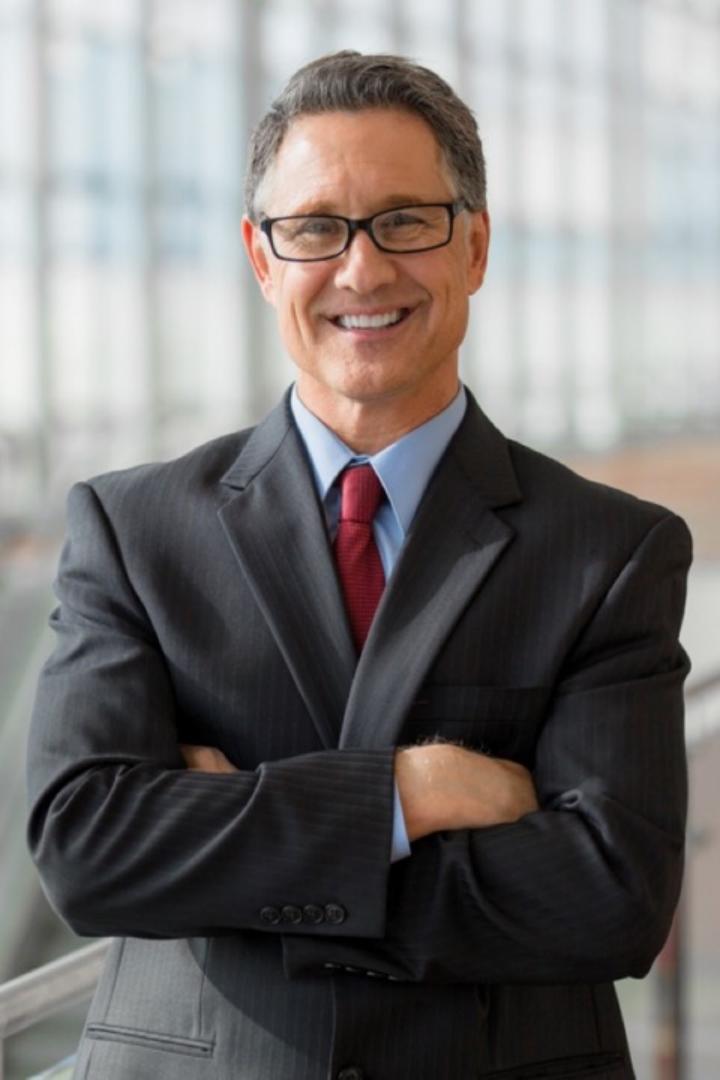
- Composite structure
- Blend of other organization types
- Special projects
- Project manager power unique to the structure

# Project Management Offices

- PMO organizes and manages control over all projects
  - Program management office
  - Project office or program office
- Uniform approach for all projects
- PMO can help project managers share resources across projects
- Offer coaching and communication
- Change control and stakeholder management
- Help resolve issues

# Project Management Office

- Uniform approach
- Support for project manager
- PMO provides organizational process assets
  - Training
  - Software
  - Templates
  - Standard project management approaches



## Directive PMO

- Project manager is part of the PMO
- Manages and controls all projects
- PMO control is high

# Controlling PMO

- Defines project governance
- Required templates and forms
- Defined project management activities
- Communication requirements
- PMO control is considered moderate



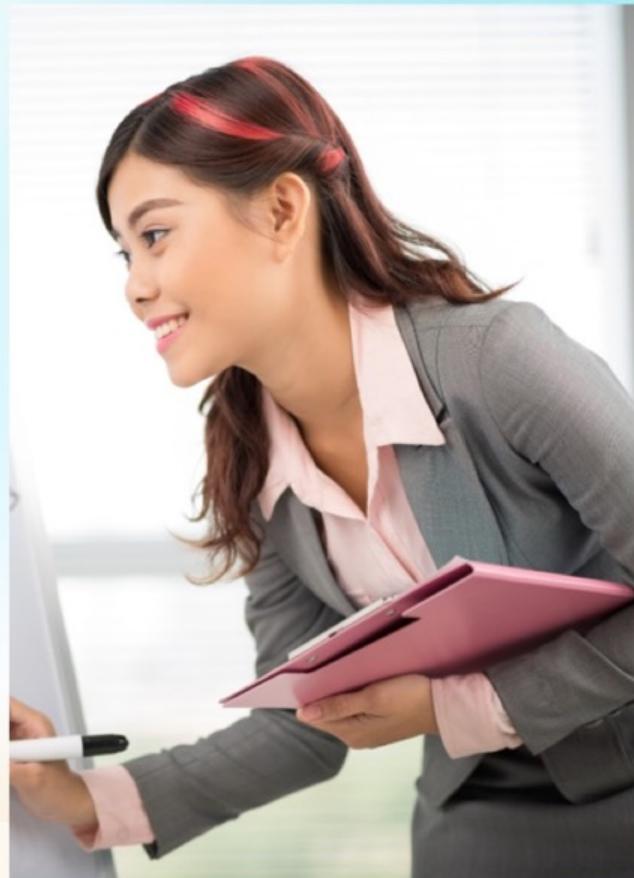


# Supportive PMO

- Acts as a consultative role:
  - Offers advice
  - Best practices
  - Lessons learned
  - Forms and software
  - Project information from similar projects
- PMO control is low

# Role of the Project Manager

- Manage things, lead people
  - Manage the project, lead people to conclusion
- Gets things done
  - Working in the system and framework
- Active listener
  - Receiver restates what the sender has said to clarify and confirm



# Project Manager Communicates

- Formal communications: reports and presentations
- Informal communications: e-mails and “hallway” meetings
- Vertical communications: follow the organizational flowchart
- Horizontal communications: director-to-director



# Project Managers Negotiate

---

- Aim for a fair agreement
- Priorities
- Technical approach
- Project scope
- Schedule
- Cost
- Changes to the project scope, schedule, or budget
- Vendor terms and conditions
- Project team member assignments and schedules
- Resource constraints

# Project Managers Problem Solve

- Problem definition
- Root-cause analysis
- Treat causes, not symptoms
- Go to the problem
- Don't go to management without a solution

# Project Manager Influences

- Stakeholder influences:
  - Project team: leads and directs the team
  - Organizational managers: work with managers to have access to resources
  - Project management office: work with the project management office
  - Steering committee: report on the project status and progress

# Project Manager Influences

- Stakeholder influences:
  - Project team: leads and directs the team
  - Organizational managers: work with managers to access resources
  - Project management office: work with the project management office
  - Steering committee: report on the project status and progress

# Influencing the Project

- Communication skills
- Positive attitude – project leadership

# Influencing the Organization

---

- Organization characteristics:
  - Policies
  - Modes of operations
  - Underlying culture
  - Political alliances
  - Differing motivations
  - Conflicting interests
  - Power struggles



# Managing Social, Economic, and Environmental Project Influences

- Marketplace and economic conditions
- Environmental concerns and regulations
- Social view of the project and its outcomes

**01**

Current  
trends and  
practices

**02**

Project  
management  
communities

**03**

Project  
management  
education

**04**

Application  
areas

# Cultural and Industry Influences



# Competency Model

# Three Project Management Value



## Values

Project managers need a combination of knowledge, performance, and personal traits to be successful.

- ✓ Knowledge: understanding project management
- ✓ Performance: accomplish as a project manager
- ✓ Personal: behavior, effectiveness, character, leadership

# Three Project Manager Values

- Knowledge: understanding project management
- Performance: accomplish as a project manager
- Personal: behavior, effectiveness, character, leadership

01

Apply project  
management  
knowledge

02

Knowledge areas  
are technical  
project skills

03

Business skills  
and business  
expertise

Technical Project Management Skills

# Technical Project Management Skills

- Critical project management skills:
  - Critical project success factors
  - Schedule management
  - Selected financial reports
  - Issue log maintenance
  - Tailor techniques and methods
  - Plan thoroughly and prioritize
  - Manage schedule, cost, resources, and risks

# Strategic and Business Management Skills

01

Ability to see the high-level overview of the organization

02

Effectively negotiate and implement decisions

03

Knowledge of other functions such as finance, marketing, and operations

# Business Knowledge

Strategy	Explain essential business aspects of a project
Team	Work with the project sponsor, team, and SMEs
Value	Implement strategy to maximize business value

# Project Management and Business Skills

- Risks and issues
- Financial implications
- Cost-benefits analysis: net present value, return on investment
- Business value
- Benefits realization expectations and strategies
- Scope, budget, schedule, and quality

# Leadership Skills

- Having a vision
- Optimistic and positive
- Seeking collaboration
- Managing relationships and conflict
- Communicating effectively
- Asking and listening to feedback
- Giving credit to appropriate people
- Action- and results-oriented

# Leadership Skills

1

Guide

- Lead people to results.

3

Negotiate

- Fair and balanced results

5

Communicate

- 90% of project management

7

Think

- Critical thinking is a skill

2

Motivate

- Inspire and direct the project team

4

Resilience

- Work through issues

6

Solve

- Solve problems and quick wins

8

Interpersonal

- Approachable and friendly

# Dealing With People

- Stakeholders are people
- People skills – soft skills
- Emotional intelligence
  - Understand emotion and behavior
  - Control emotions and responses
  - Influence others' emotions



# The Six Leadership Styles



## TRANSACTIONAL

Sometimes called  
management by exception.

## Rewards and Punishments

Emphasizes the goals of the project and rewards and provides disincentives for the project team.

This is sometimes called management by exception, because it's the exception that is rewarded or punished

# The Six Leadership Styles



## SERVANT LEADER

Focus on needs of the project team and people served.

### Carry Food and Water

Focus on putting others first and the needs of the people he serves.

Servant leaders provide opportunity for growth, education, autonomy within the project, and the well-being of others.

# The Six Leadership Styles



## LAISSEZ-FAIRE

Hands-off approach  
to project decisions

### Project Team Decisions

The project leader takes a “hands-off” approach to the project. This means the project team makes decisions and creates goals.

Though this approach can provide autonomy, it can make the leader appear absent when it comes to project decisions.

# The Six Leadership Styles



## TRANSFORMATIONAL

Inspiring and motivational

### Find Innovative Solutions

The project leader inspires and motivates the project team to achieve the project goals.

Transformational leaders aim to empower the project team to take action, be innovative in the project work, and accomplish through ambition.

# The Six Leadership Styles



## CHARISMATIC

You can do more than you think you can do.

### “Do as I do now”

The project leader is motivating, has high energy, and inspires the team through strong convictions about what's possible and what the team can achieve.

The charismatic leader inspires the team and helps them achieve the project goals.

# The Six Leadership Styles



## INTERACTIONAL

Fantastic, hybrid type of leadership

## Coaching and Motivational

Project leader is a hybrid of transactional, transformational, and charismatic leaders.

The interactional leader wants the team to take action, is excited and inspired about the project work, yet still holds the team accountable for their results.



# Comparing Leadership and Management

---

- Leadership and management are not the same things
- Leadership is about aligning and motivating
- Leadership is more about emotional intelligence
- Leadership is inspiring people to work together to achieve great things
- Management is about getting things done
- Management is about business skills

# Management and Leadership

Management	Leadership
Direct using positional power	Guide, influence, and collaborate
Maintain	Develop
Administratate	Innovate
Focus on systems and structure	Focus on relationships
Control	Trust
Near-term goals	Long-range vision
How and when	What and why
Bottom line	Horizon
Do things right	Do the right things
Operational issues and problem solving	Vision, alignment, motivation, inspiration

# Power and Politics

- Understand how the organization works to be successful
- Being sensitive and respectful to people
- Perception and power



# Politics, Power, and Getting Things Done

- Politics are neither good or bad
- Politics happen in all organizations
- Understand how the organization works
- Goal is to get things done

# Positional Power

Result of the position of the project manager. This is also known as formal, authoritative, and legitimate power.



# Informational Power

Control of data gathering and distribution of information. Keeps information to keep power.



# Referent Power

Respected or admired because of past experiences. The project team or stakeholders have worked with the project manager before.



# Situational Power

Because of certain situations in the organization, such as a change in leadership or change in the project team.



# Personal or Charismatic Power

Warm personality that others like. Has a friendly demeanor.



# Reward Power

Can reward the project team, so the project team acts accordingly.



# Ingratiating Power

Gains favor through flattery. False power as this wears down.



# Pressure-based Power

Can restrict choices to get the project team to perform and do the project work.



# Guilt-based Power

Can make the team and stakeholders feel guilty in order to gain compliance.



# Persuasive Power

Persuade people toward a specific outcome or decision.



# Avoiding Power

Refuses to act, get involved, or make decisions.



# Project Integration Management

- Alignment of benefits, management, project life cycle
- Creating the project management plan
- Creating and managing project knowledge
- Managing performance and changes of the activities
- Making integrated decisions

# Tailoring Project Integration Management

- Tailor the processes as needed
- As allowed by governance
- Enterprise environmental factors
- PMOs

# Considerations for Adaptive Environments

- Team members are local domain experts
- Team members determine how plans and components should integrate



# Develop Project Charter

- Authorizes the project and project manager
- Authorized external to the project
- Appropriate power
- Portfolio Steering Committee
- Usually once, can be multiple points in project

Project purpose

Measurable project objectives

High-level requirements

Overall project risk

Summary milestone schedule

Preapproved financial resources

# Developing the Project Charter

Key stakeholders

Approval requirements

Exit criteria – close or cancel

Assigned project manager

Sponsor

Developing the Project Charter

Project purpose

Measurable project objectives

High-level requirements

Overall project risk

Summary milestone schedule

Preapproved financial resources

# Developing the Project Charter

Key stakeholders

Approval requirements

Exit criteria – close or cancel

Assigned project manager

Sponsor

Developing the Project Charter

# Future Value of Money

- $FV = PV(1+i)^n$  where:
  - FV is future value
  - PV is present value
  - i is the given interest rate
  - n is the number of time periods

# Future Value of Money

- $FV = PV(1+i)^n$ 
  - PV is \$100,000
  - i is .06
  - n is five years

# Future Value of Money

- $FV = PV(1+i)^n$ 
  - PV is \$100,000
  - i is .06
  - n is five years
- $FV = 100,000(1.06)^5$ 
  - $FV = 100,000(1.338226)$
  - $FV = 133,822.60$

# Present Value of Money

- $PV=FV/(1+i)^n$ 
  - PV is present value
  - FV is future value
  - i is the given interest rate
  - n is the number of time periods

# Present Value of Money

- $PV=FV/(1+i)^n$ 
  - FV is \$160,000
  - i is .06
  - n is five years
- $PV=160,000/(1.338226)$
- $PV=\$119,561$

# Net Present Value

Time Period	Cash Flow	Present Value
1	\$15,000	\$14,150.94
2	\$25,000	\$22,249.91
3	\$17,000	\$14,273.53
4	\$25,000	\$19,802.34
5	\$18,000	\$13,450.65
Totals	\$100,000	\$83,927.37
Investment		\$78,000.00
NPV		\$5,927.37



# Assumption log

---

- Believed to be true, not proven
- Updated throughout the project
- Assumptions and constraints

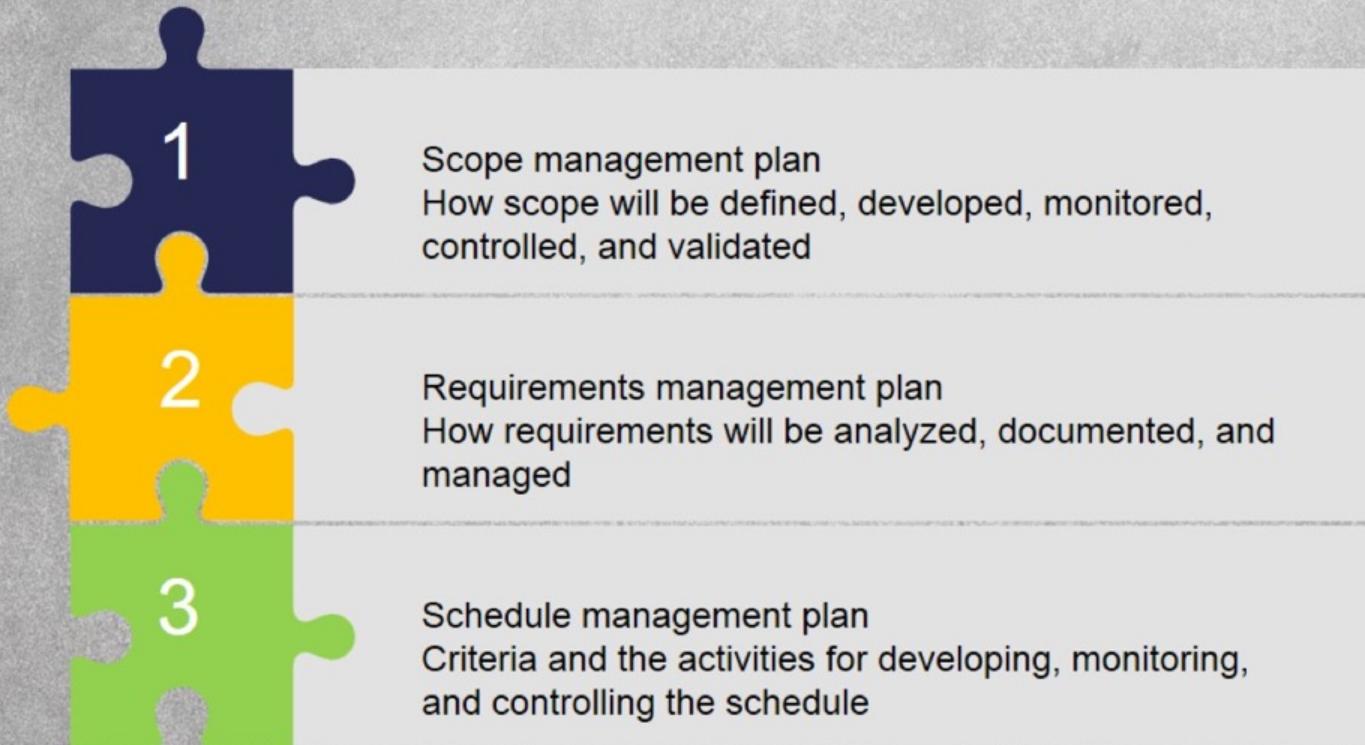
# Examples of Assumptions

- Team member availability
- Team member performance
- Skills to do the project work
- Vendor delivery
- Vendor performance
- Accuracy of schedule and cost estimates

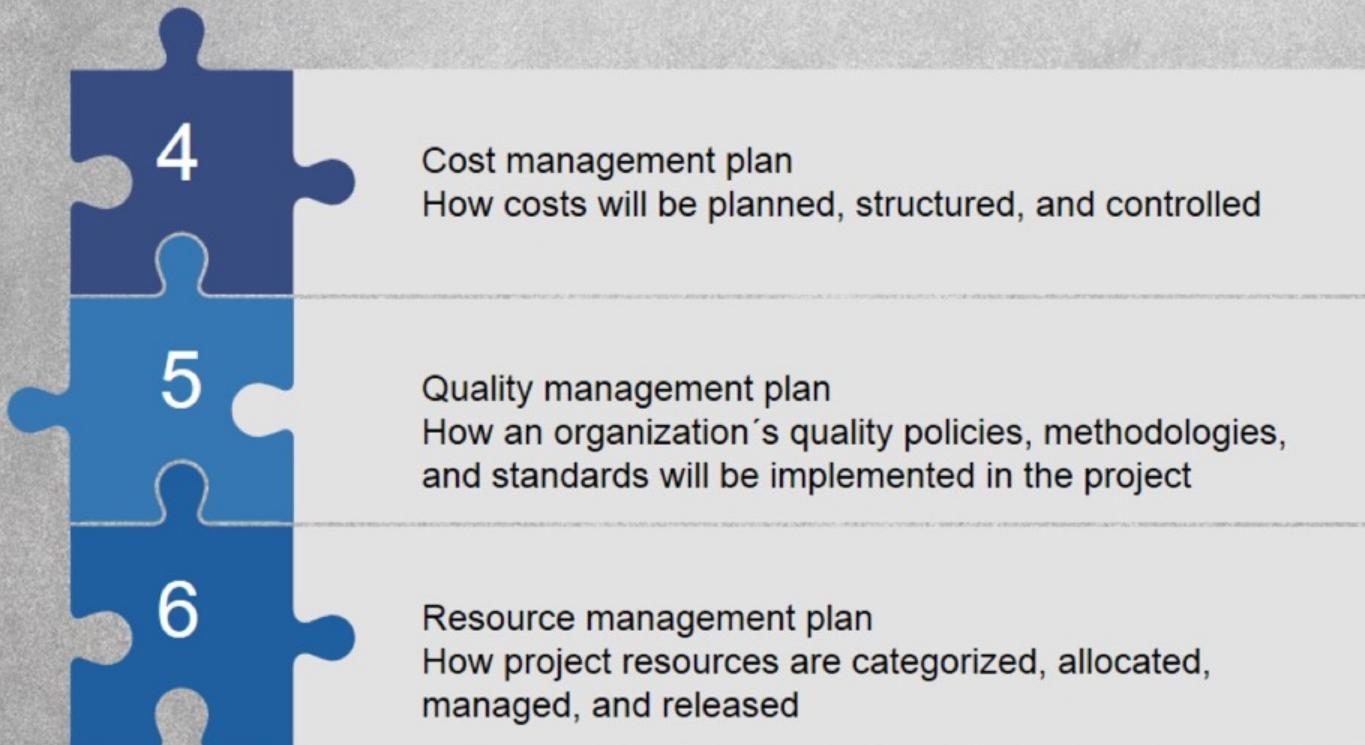
# Examples of Constraints

- Policies and procedures
- Regulations
- Predetermined budget or schedule
- Resource utilization
- Requirements
- Approach to work

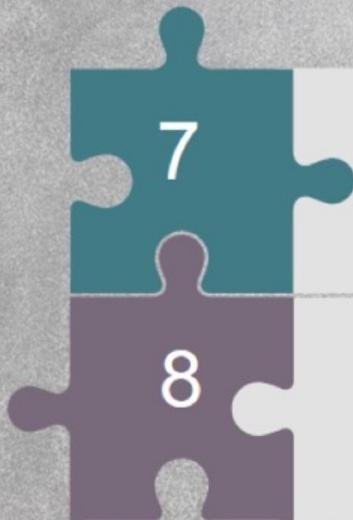
# Typical Project Management Plan



# Typical Project Management Plan



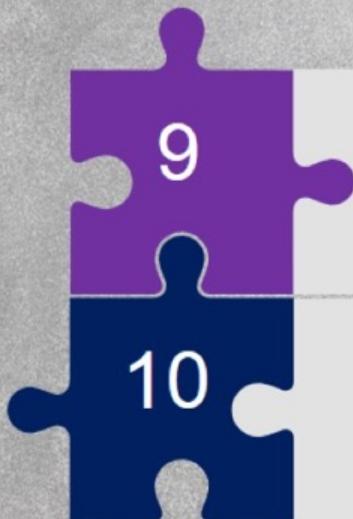
# Typical Project Management Plan



Communications management plan  
How, when, and by whom information will be administered and disseminated

Risk management plan  
How risk management activities will be structured and performed

# Typical Project Management Plan



## Procurement management plan

How the project team will acquire goods and services from outside of the performing organization

## Stakeholder engagement plan

How stakeholders will be engaged in project decisions and execution

# Integrated Change Control

- Happens throughout the project
- Responsibility of the project manager
- Happens after a baseline established
- Examines the effect of change on the entire project
- Verbal changes happen, but should be documented

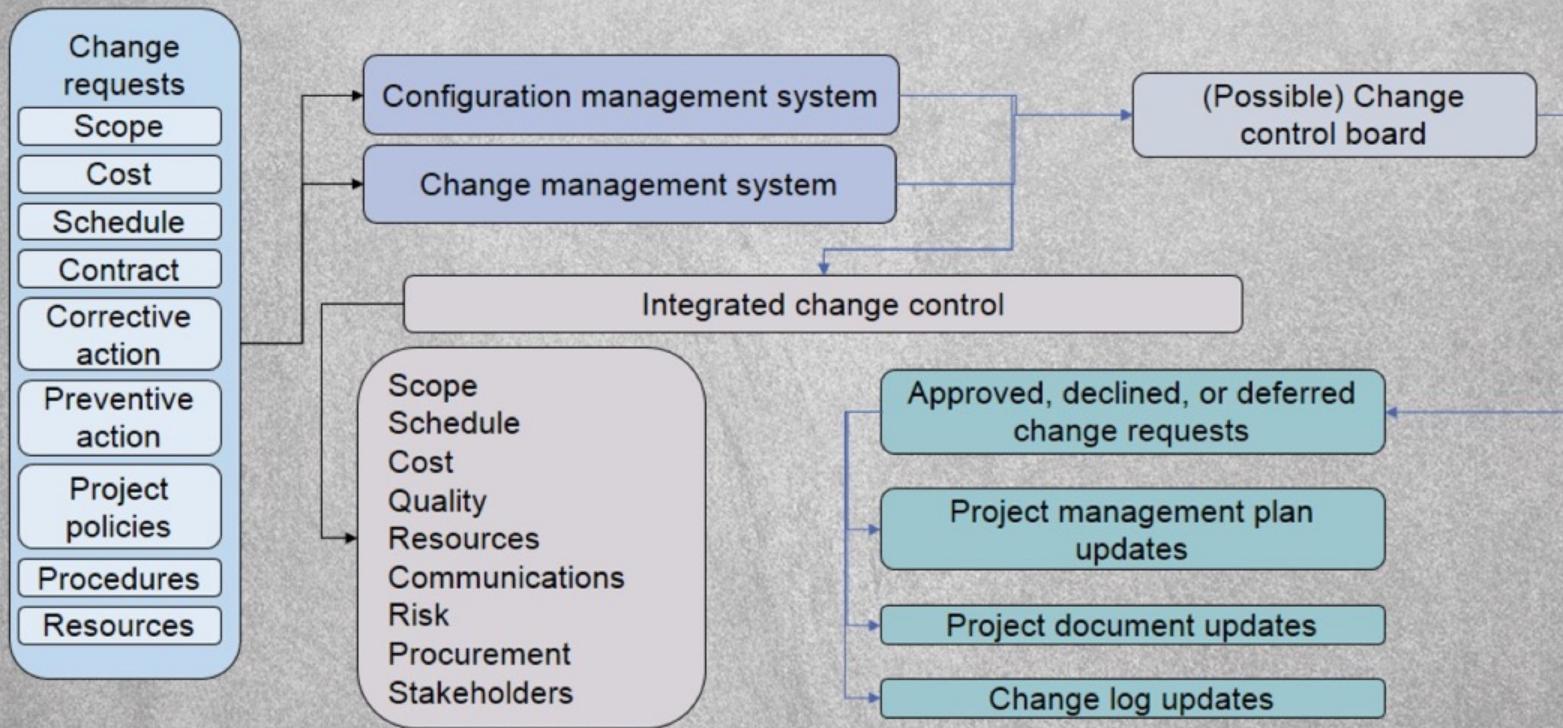
# Kick-off Meetings and Project Size

- Smaller projects: one team performs planning and execution.  
Kick-off occurs after initiation, in planning
- Large projects: project management team does the planning, and the team is brought on when initial planning is complete. The kick-off meeting takes place with processes in the executing process group
- Multiphase projects will typically include a kick-off meeting at the beginning of each phase

# Integrated Change Control

- Change requests:
  - Entered into change management system
  - Or configuration management system (features and functions)
  - Approved
  - Deferred
  - Rejected
- Change approval level defined in project plan
- Change Control Board may be utilized
- Over/Under change approval/rejections

# Integrated Change Control Workflow

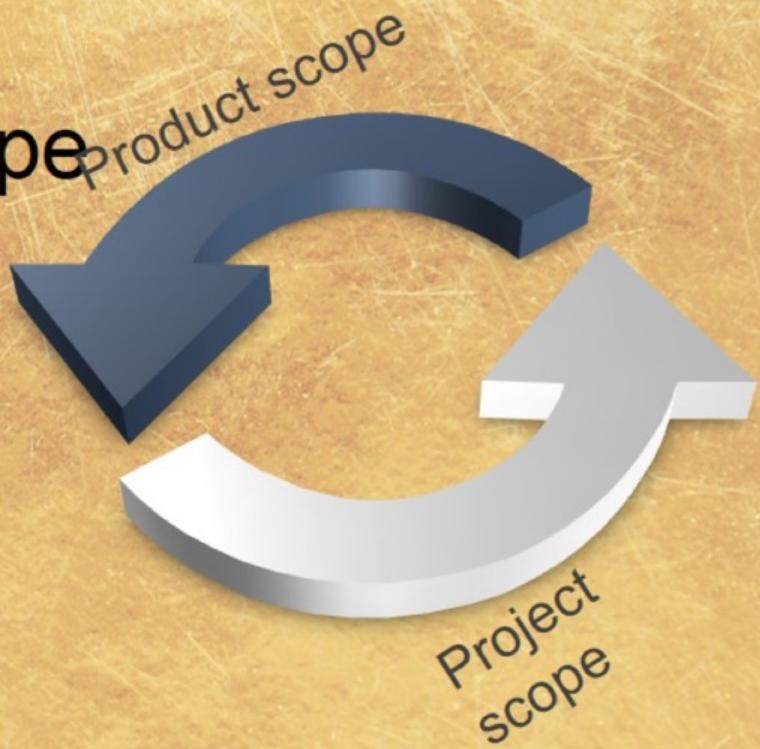


# Closing Activities

- Finalize project or phase records
- Audit project for success or failure,
- Manage knowledge sharing and transfer
- Complete lessons learned
- Archive project information

# Project and Product Scope

- Product scope
  - Features and functions
- Project scope
  - Work to be completed



# Scope and Project Life Cycles

- Predictive – project scope defined at beginning
- Adaptive – project scope developed through iterations
- Predictive – change resistant
- Adaptive – expect changes

# Product Scope

- Characteristics of customers' deliverable
- Product backlog is adaptive
- Product scope is derived from collected requirements
- Validate scope is product scope confirmation

# Scope and Project Completion

- Project scope is measured against project plan
- Product scope is measured against project requirements
- Requirements are conditions or capabilities that must exist in a product, service, or result

# Tailoring Scope Management Processes

- Knowledge and requirements management
- Validation and control
- Development approach
- Stability of requirements
- Governance

# Emerging Trends for Scope

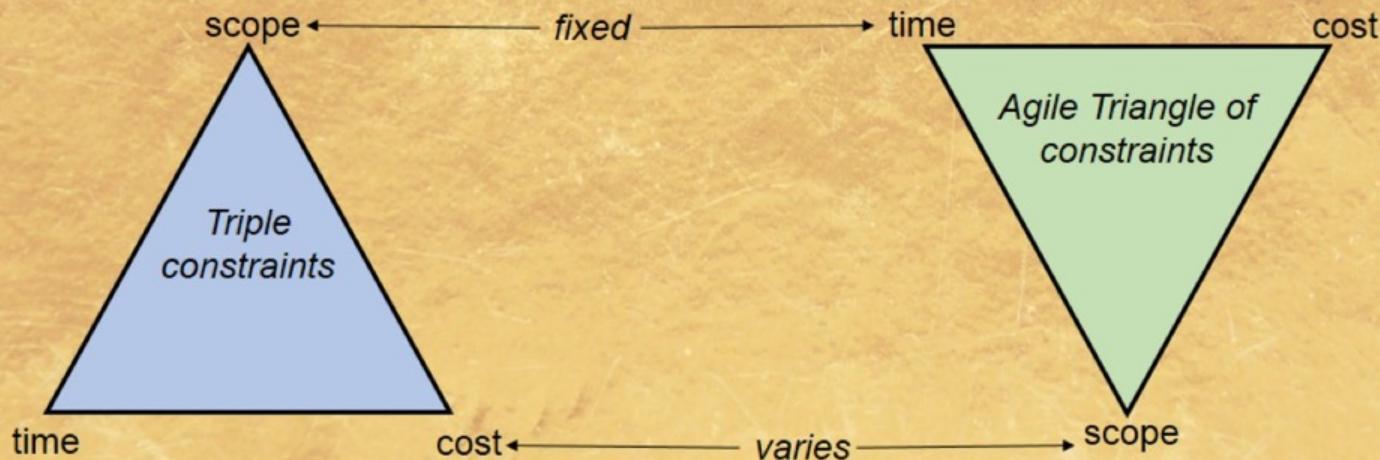
- Collaborating with business analysts in order to:
  - Identify problems
  - Define business needs
  - Recommend viable solutions for needs
  - Elicit, document, and manage stakeholder requirements in order to meet business and project objectives
  - Facilitate the successful implementation of the end result of project

# Project Manager and Business Analysts

- Collaborative partnership
- BA has requirements responsibilities
- PM has project delivery responsibilities
- Both roles need to understand their “swim lanes”

# Inverted Triangle Model

- Time cost scope
- What's a variable and what is fixed



# Grooming the Backlog

- The product owner owns the backlog
- Backlog refinement is the prioritization backlog items
- The entire project team may participate in the backlog grooming

# Scope Management Plan

- Not the project scope
- How to create the project scope statement
- How WBS will be created
- How the scope baseline will be approved and maintained
- How formal acceptance of the deliverables happens

# Requirements Management Plan

- Requirements activities will be planned, tracked, and reported
- Configuration management activities
- Requirements prioritization process
- Metrics that will be used
- Requirements traceability matrix (RTM)

# Collecting the Project Requirements

- Process of determining, documenting, and managing requirements
- Requirements help define the product scope and project scope
- Collect requirements can be performed once or at predefined points