The Project Management Process Groups

Project Management Process Groups

A **process** is a series of actions directed toward a particular result

Project management can be viewed as a number of interlinked processes

Project Management Process Groups

**Initiating processes**: defining and authorizing a project or project phase

Planning processes: devising and maintaining a workable scheme to ensure that the project addresses the organization's needs

Executing processes: coordinating people and other resource to carry out the various plans and create the products, services, or results of the project or phase

Monitoring and controlling processes: measuring and monitoring progress to ensure that the project team meets the project objectives.

Closing processes: formalizing acceptance of the project or project phase and ending it efficiently

Level of Activity and Overlap of Process Groups Over Time
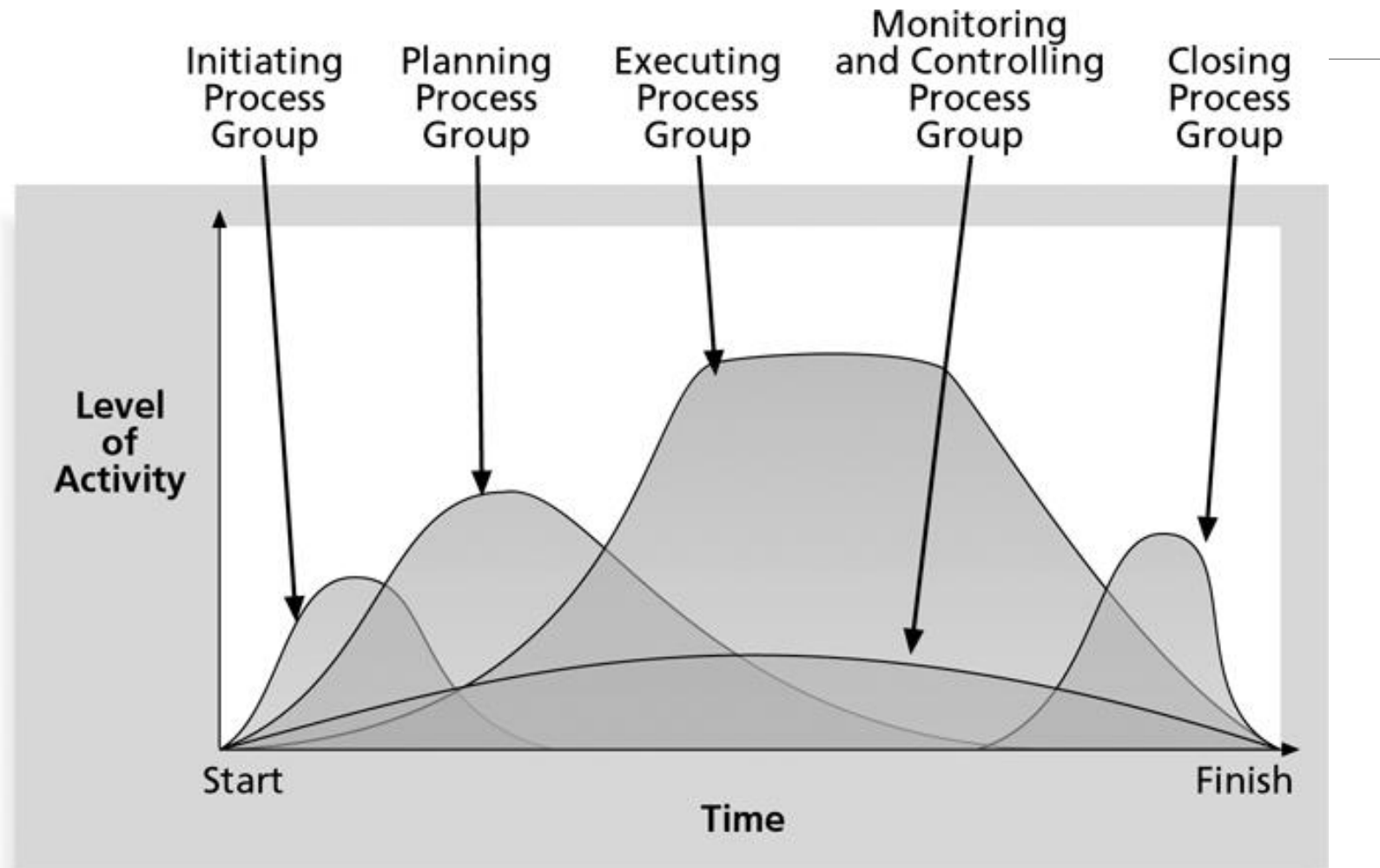
Relationships Among Process Groups and Knowledge Areas

KNOWLEDGE AREA	PROJECT MANAGEMENT PROCESS GROUPS				
	INITIATING	**PLANNING**	**EXECUTING**	**MONITORING & CONTROLLING**	**CLOSING**
Project Integration Management	Develop project charter, Develop preliminary project scope statement	Develop project management plan	Direct and manage project execution	Monitor and control project work, Integrated change control	Close project
Project Scope Management		Scope planning, Scope definition, Create WBS		Scope verification, Scope control	
Project Time Management		Activity definition, Activity sequencing, Activity resource estimating, Activity duration estimating, Schedule development		Schedule control	
Project Cost Management		Cost estimating, Cost budgeting		Cost control	

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Relationships Among Process Groups and Knowledge Areas (continued)

KNOWLEDGE AREA	PROJECT MANAGEMENT PROCESS GROUPS				
	INITIATING	PLANNING	EXECUTING	MONITORING & CONTROLLING	CLOSING
Project Quality Management		Quality planning	Perform quality assurance	Perform quality control	
Project Human Resource Management		Human resource planning	Acquire project team, Develop project team	Manage project team	
Project Communications Management		Communications planning	Information distribution	Performance reporting, Manage stakeholders	
Project Risk Management		Risk management planning, Risk identification, Qualitative risk analysis, Quantitative risk analysis, Risk response planning		Risk monitoring and control	
Project Procurement Management		Plan purchases and acquisitions, Plan contracting	Request seller responses, Select sellers	Contract administration	Contract closure

PMBOK® Guide Third Edition, 2004, p. 69

Project Management Methodology
(PMBOK Guide)

PRojects IN Controlled Environments (PRINCE2):
- 1.Starting up a project
- 2. Planning
- 3. Initiating a project
- 4. Directing a project
- 5. Controlling a stage
- 6. Managing product delivery
- 7. Managing stage boundaries
- 8. Closing a project

Agile methods: adaptive software development
- include an iterative workflow and incremental delivery of software in short iterations: Agile Unified Process (AUP), Scrum

Rational Unified Process (RUP) framework: RUP is an iterative software development process that focuses on team productivity and delivers software best practices to all team members.

Six Sigma methodologies:
- Improve an existing business process: Define, Measure, Analyze, Improve, and Control (DMAIC)
- Create new product or process design : Define, Measure, Analyze, Design, and Verify (DMADV)

Project Initiating

Project Initiation

Initiating a project includes recognizing and starting a new project or project phase

Some organizations use a pre-initiation phase, while others include items like developing a business case as part of initiation

The main goal is to formally select and start off projects

Key outputs include:
- Assigning the project manager
- Identifying key stakeholders
- Completing a business case
- Completing a project charter and getting signatures on it

Pre-Initiation Tasks

Determine the scope, time, and cost constraints for the project

Identify the project sponsor

Select the project manager

Develop a business case for a project

Meet with the project manager to review the process and expectations for managing the project

Determine if the project should be divided into two or more smaller projects

Business case

Introduction/Background

JWD Consulting's core business goal is to provide world-class project management consulting services to various organizations. The CEO, Joe Fleming, believes the firm can streamline operations and increase business by providing information related to project management on its intranet site, making some information and services accessible to current and potential clients.

Business Objective

2.0 Business Objective

JWD Consulting's strategic goals include continuing growth and profitability. The project management intranet site project will support these goals by increasing visibility of the firm's expertise to current and potential clients by allowing client and public access to some sections of the intranet. The project will also improve profitability by reducing internal costs by providing standard tools, techniques, templates, and project management knowledge to all internal consultants. Because JWD Consulting focuses on identifying profitable projects and measuring their value after completion, this project must meet those criteria.

Business case

Current Situation and Problem/Opportunity Statement

3.0 Current Situation and Problem/Opportunity Statement

JWD Consulting has a corporate Web site as well as an intranet. The firm currently uses the Web site for marketing information. The primary use of the intranet is for human resource information, such as where consultants enter their hours on various projects, change and view their benefits information, and access an online directory and Web-based e-mail system. The firm also uses an enterprise-wide project management system to track all project information, focusing on the status of deliverables and meeting scope, time, and cost goals. There is an opportunity to provide a new section on the intranet dedicated to sharing consultants' project management knowledge across the organization. JWD Consulting only hires experienced consultants and gives them freedom to manage projects as they see fit. However, as the business grows and projects become more complex, even experienced project managers are looking for suggestions on how to work more effectively.

Business case

Critical Assumptions and Constraints

4.0 Critical Assumptions and Constraints

The proposed intranet site must be a valuable asset for JWD Consulting. Current consultants and clients must actively support the project, and it must pay for itself within one year by reducing internal operating costs and generating new business. The Project Management Office manager must lead the effort, and the project team must include participants from several parts of the company, as well as from current client organizations. The new system must run on existing hardware and software, and it should require minimal technical support. It must be easily accessible by consultants and clients and be secure from unauthorized users.

5.0 Analysis of Options and Recommendation

There are three options for addressing this opportunity:

1. Do nothing. The business is doing well, and we can continue to operate without this new project.
2. Purchase access to specialized software to support this new capability with little in-house development.
3. Design and implement the new intranet capabilities in-house, using mostly existing hardware and software.

Based on discussions with stakeholders, we believe that option 3 is the best option.

Business case

6.0 Preliminary Project Requirements

The main features of the project management intranet site include the following:

1. Access to several project management templates and tools. Users must be able to search for templates and tools, read instructions for using these templates and tools, and see examples of how to

   apply them to real projects. Users must also be able to submit new templates and tools, which should first be screened or edited by the Project Management Office.

2. Access to relevant project management articles. Many consultants and clients sense an information overload when they research project management information. They often waste time they should be spending with their clients. The new intranet should include access to several important articles on various project management topics, which are searchable by topic, and allow users to ask the Project Management Office staff to find additional articles to meet their needs.

3. Links to other, up-to-date Web sites, with brief descriptions of the main features of the external sites.

4. An "Ask the Expert" feature to help build relationships with current and future clients and share knowledge with internal consultants.

5. Appropriate security to make the entire intranet site accessible to internal consultants and certain sections accessible to others.

6. The ability to charge money for access to some information. Some of the information and features of the intranet site should prompt external users to pay for the information or service. Payment options should include a credit card option or similar online payment transactions. After the system verifies payment, the user should be able to access or download the desired information.

7. Other features suggested by users, if they add value to the business.

Business case

- Budget Estimate and Financial Analysis

7.0 Budget Estimate and Financial Analysis

A preliminary estimate of costs for the entire project is $140,000. This estimate is based on the project manager working about 20 hours per week for six months and other internal staff working a total of about 60 hours per week for six months. The customer representatives would not be paid for their assistance. A staff project manager would earn $50 per hour. The hourly rate for the other project team members would be $70 per hour, because some hours normally billed to clients may be needed for this project. The initial cost estimate also includes $10,000 for purchasing software and services from suppliers. After the project is completed, maintenance costs of $40,000 are included for each year, primarily to update the information and coordinate the "Ask the Expert" feature and online articles.

Projected benefits are based on a reduction in hours that consultants spend researching project management information, appropriate tools, and templates. Projected benefits are also based on a small increase in profits due to new business generated by this project. If each of 400 consultants saved just 40 hours each year (less than one hour per week) and could bill that time to other projects that generate a conservative estimate of $10 per hour in *profits*, then the projected benefit would be $160,000 per year. If the new intranet increased business by just 1 percent, using past profit information, increased profits due to new business would be at least $40,000 each year. Total projected benefits, therefore, are about $200,000 per year. Exhibit A summarizes the projected costs and benefits and shows the estimated net present value (NPV), return on investment (ROI), and year in which payback occurs. It also lists assumptions made in performing this preliminary financial analysis. All of the financial estimates are very encouraging. The estimated payback is within one year, as requested by the sponsor. The NPV is $272,800, and the discounted ROI based on a three-year system life is excellent at 112 percent.

Business case

Schedule Estimate

8.0 Schedule Estimate

The sponsor would like to see the project completed within six months, but there is some flexibility in the schedule. We also assume that the new system will have a useful life of at least three years.

Analysis of Options and Recommendation

9.0 Potential Risks

This project carries several risks. The foremost risk is a lack of interest in the new system by our internal consultants and external clients. User inputs are crucial for populating information into this system and realizing the potential benefits from using the system. There are some technical risks in choosing the type of software used to search the system, check security, process payments, and so on, but the features of this system all use proven technologies. The main business risk is investing the time and money into this project and not realizing the projected benefits.

Business case

10.0 Exhibits

Exhibit A: Financial Analysis for Project Management Intranet Site Project

Discount rate	8%				
Assume the project is done in about 6 months		Year			
	0	1	2	3	Total
Costs	140,000	40,000	40,000	40,000	
Discount factor	1	0.93	0.86	0.79	
Discounted costs	140,000	37,037	34,294	31,753	243,084
Benefits	0	200,000	200,000	200,000	
Discount factor	1	0.93	0.86	0.79	
Discounted benefits	0	186,185	171,468	158,766	515,419
Discounted benefits - costs	(140,000)	148,148	137,174	127,013	
Cumulative benefits - costs	(140,000)	8,148	145,322	272,336	← NPV
	Payback in Year 1				
Discounted life cycle ROI------------>	112%				
Assumptions					
Costs	# hours				
PM (500 hours, $50/hour)	25,000				
Staff (1500 hours, $70/hour)	105,000				
Outsourced software and services	10,000				
Total project costs (all applied in year 0)	140,000				
Benefits					
# consultants	400				
Hours saved	40				
$/hour profit	10				
Benefits from saving time	160,000				
Benefits from 1% increase in profits	40,000				
Total annual projected benefits	200,000				

Identifying Project Stakeholders

A **stakeholder analysis** is a technique that project managers can use to help understand and increase the support of stakeholders throughout the project.

This strategy includes basic information such as stakeholder names, level of interest in the project, level of influence on the project, and potential management strategies for gaining support or reducing obstacles from each stakeholder.

It should be considered ***confidential***

Drafting the Project Charter

Project Charter

Project Title: Project Management Intranet Site Project

Project Start Date: May 2   **Projected Finish Date:** November 4

Budget Information: The firm has allocated $140,000 for this project. The majority of costs for this project will be internal labor. An initial estimate provides a total of 80 hours per week.

Project Manager: Erica Bell, (310) 555-5896, erica_bell@jwdconsulting.com

Project Objectives: Develop a new capability accessible on JWD Consulting's intranet site to help internal consultants and external customers manage projects more effectively. The intranet site will include several templates and tools that users can download, examples of completed templates and related project management documents used on real projects, important articles related to recent project management topics, an article retrieval service, links to other sites with useful information, and an "Ask the Expert" feature, where users can post questions about their projects and receive advice from experts in the field. Some parts of the intranet site will be accessible free to the public, other parts will only be accessible to current customers and internal consultants, and other parts will be accessible for a fee.

Main Project Success Criteria: The project should pay for itself within one year of completion.

Main Project Success Criteria: The project should pay for itself within one year of completion.

Approach:
- Develop a survey to determine critical features of the new intranet site and solicit input from consultants and customers.
- Review internal and external templates and examples of project management documents.
- Research software to provide security, manage user inputs, and facilitate the article retrieval and "Ask the Expert" features.
- Develop the intranet site using an iterative approach, soliciting a great deal of user feedback.
- Determine a way to measure the value of the intranet site in terms of reduced costs and new revenues, both during the project and one year after project completion.

ROLES AND RESPONSIBILITIES

Name	Role	Position	Contact Information
Joe Fleming	Sponsor	JWD Consulting, CEO	joe_fleming@jwdconsulting.com
Erica Bell	Project Manager	JWD Consulting, manager	erica_bell@jwdconsulting.com
Michael Chen	Team Member	JWD Consulting, senior consultant	michael_chen@jwdconsulting.com
Jessie Faue	Team Member	JWD Consulting, consultant	jessie_faue@jwdconsulting.com
Kevin Dodge	Team Member	JWD Consulting, IT department	kevin_dodge@jwdconsulting.com
Cindy Dawson	Team Member	JWD Consulting, IT department	cindy_dawson@jwdconsulting.com
Kim Phuong	Advisor	Client representative	kim_phuong@client1.com
Page Miller	Advisor	Client representative	page_miller@client2.com

Sign-Off: (Signatures of all the above stakeholders)

Comments: (Handwritten or typed comments from above stakeholders, if applicable)

"I will support this project as time allows, but I believe my client projects take priority. I will have one of my assistants support the project as needed."—Michael Chen

"We need to be extremely careful testing this new system, especially the security in giving access to parts of the intranet site to the public and clients."—Kevin Dodge and Cindy Dawson

Kick-Off Meeting
[Date of Meeting]

Project Name: Project Management Intranet Site Project

Meeting Objective: Get the project off to an effective start by introducing key stakeholders, reviewing project goals, and discussing future plans

Agenda:

- Introductions of attendees
- Review of the project background
- Review of project-related documents (i.e., business case, project charter)
- Discussion of project organizational structure
- Discussion of project scope, time, and cost goals
- Discussion of other important topics
- List of action items from meeting

Action Item	Assigned To	Due Date

Date and time of next meeting:

Project Planning

Project Planning

The main purpose of project planning is to guide execution

Every knowledge area includes planning information

Key outputs :
- A team contract
- A project scope statement
- A work breakdown structure (WBS)
- A project schedule, in the form of a Gantt chart with all dependencies and resources entered
- A list of prioritized risks (part of a risk register)

Planning processes and outputs

Knowledge Area	Planning Process	Outputs
Project Integration Management	Develop project management plan	Project management plan
Project Scope Management	Plan scope management	Scope management plan Requirements management plan
	Collect requirements	Requirements documentation Requirements traceability matrix
	Define scope	Project scope statement Project documents updates
	Create WBS	Scope baseline Project documents updates

Project Time Management	Plan schedule management	Schedule management plan
	Define activities	Activity list
		Activity attributes
		Milestone list
		Project management plan updates
	Sequence activities	Project schedule network diagrams
		Project documents updates
	Estimate activity resources	Activity resource requirements
		Resource breakdown structure
		Project documents updates
	Estimate activity durations	Activity duration estimates
		Project documents updates
	Develop schedule	Schedule baseline
		Project schedule
		Schedule data
		Project calendars
		Project management plan updates
		Project documents updates

Project Cost Management	Plan cost management	Cost management plan
	Estimate costs	Activity cost estimates
		Basis of estimates
		Project documents updates
	Determine budget	Cost baseline
		Project funding requirements
		Project documents updates

Project Quality Management	Plan quality management	Quality management plan
		Process improvement plan
		Quality metrics
		Quality checklists
		Project documents updates
Project Human Resource Management	Plan human resource management	Human resource plan
Project Communications Management	Plan communications management	Communications management plan
		Project documents updates
Project Risk Management	Plan risk management	Risk management plan
	Identify risks	Risk register
	Perform qualitative risk analysis	Project documents updates
	Perform quantitative risk analysis	Project documents updates
	Plan risk responses	Project management plan updates
		Project documents updates

Project Procurement Management	Plan procurement management	Procurement management plan Procurement statement of work Procurement documents Source selection criteria Make-or-buy decisions Change requests
Project Stakeholder Management	Plan stakeholder management	Stakeholder management plan Project documents updates

Code of Conduct: As a project team, we will:

- Work proactively, anticipating potential problems and working to prevent them.
- Keep other team members informed of information related to the project.
- Focus on what is best for the entire project team.

Participation: We will:

- Be honest and open during all project activities.
- Encourage diversity in team work.
- Provide the opportunity for equal participation.
- Be open to new approaches and consider new ideas.
- Have one discussion at a time.
- Let the project manager know well in advance if a team member has to miss a meeting or may have trouble meeting a deadline for a given task.

Communication: We will:

- Decide as a team on the best way to communicate. Because a few team members cannot often meet face to face, we will use e-mail, a project Web site, and other technology to assist in communicating.
- Have the project manager facilitate all meetings and arrange for phone and video conferences, as needed.
- Work together to create the project schedule and enter actuals into the enterprise-wide project management system by 4 p.m. every Friday.
- Present ideas clearly and concisely.
- Keep discussions on track.

Problem Solving: We will:

- Encourage everyone to participate in solving problems.
- Only use constructive criticism and focus on solving problems, not blaming people.
- Strive to build on each other's ideas.

Meeting Guidelines: We will:

- Plan to have a face-to-face meeting the first and third Tuesday morning of every month.
- Meet more frequently the first month.
- Arrange for telephone or videoconferencing for participants as needed.
- Hold other meetings as needed.
- Record meeting minutes and send them via e-mail within 24 hours of all project meetings, focusing on decisions made and action items from each meeting.

Scope statement (draft version)

Project Title: Project Management Intranet Site Project

Date: May 18   **Prepared by: Erica Bell, Project Manager, erica_bell@jwdconsulting.com**

Project Summary and Justification: Joe Fleming, CEO of JWD Consulting, requested this project to assist the company in meeting its strategic goals. The new intranet site will increase visibility of the company's expertise to current and potential clients. It will also help reduce internal costs and improve profitability by providing standard tools, techniques, templates, and project management knowledge to all internal consultants. The budget for the project is $140,000. An additional $40,000 per year will be required for operational expenses after the project is completed. Estimated benefits are $200,000 each year. It is important to focus on the system paying for itself within one year of its completion.

Product Characteristics and Requirements:

1. Templates and tools: The intranet site will allow authorized users to download files they can use to create project management documents and to help them use project management tools. These files will be in Microsoft Word, Excel, Access, Project, or in HTML or PDF format, as appropriate.

2. User submissions: Users will be encouraged to e-mail files with sample templates and tools to the Webmaster. The Webmaster will forward the files to the appropriate person for review and then post the files to the intranet site, if desired.

3. Articles: Articles posted on the intranet site will have appropriate copyright permission. The preferred format for articles will be PDF. The project manager may approve other formats.

4. Requests for articles: The intranet site will include a section for users to ask someone from the Project Management Office (PMO) at JWD Consulting to research appropriate articles for them. The PMO manager must first approve the request and negotiate payments, if appropriate.

5. Links: All links to external sites will be tested on a weekly basis. Broken links will be fixed or removed within five working days of discovery.

6. The "Ask the Expert" feature must be user-friendly and capable of soliciting questions and immediately acknowledging that the question has been received in the proper format. The feature must also be capable of forwarding the question to the appropriate expert (as maintained in the system's expert database) and capable of providing the status of questions that are answered. The system must also allow for payment for advice, if appropriate.

7. Security: The intranet site must provide several levels of security. All internal employees will have access to the entire intranet site when they enter their security information to access the main, corporate intranet. Part of the intranet will be available to the public from the corporate Web site. Other portions of the intranet will be available to current clients based on verification with the current client database. Other portions of the intranet will be available after negotiating a fee or entering a fixed payment using pre-authorized payment methods.

8. Search feature: The intranet site must include a search feature for users to search by topic, key words, etc.

9. The intranet site must be accessible using a standard Internet browser. Users must have appropriate application software to open several of the templates and tools.

10. The intranet site must be available 24 hours a day, 7 days a week, with one hour per week for system maintenance and other periodic maintenance, as appropriate.

Summary of Project Deliverables

Project management-related deliverables: Business case, charter, team contract, scope statement, WBS, schedule, cost baseline, progress reports, final project presentation, final project report, lessons-learned report, and any other documents required to manage the project.

Product-related deliverables:

1. Survey: Survey current consultants and clients to help determine desired content and features for the intranet site.

2. Files for templates: The intranet site will include templates for at least 20 documents when the system is first implemented, and it will have the capacity to store up to 100 documents. The project team will decide on the initial 20 templates based on survey results.

3. Examples of completed templates: The intranet site will include examples of projects that have used the templates available on the site. For example, if there is a template for a business case, there will also be an example of a real business case that uses the template.

4. Instructions for using project management tools: The intranet site will include information on how to use several project management tools, including the following as a minimum: work breakdown structures, Gantt charts, network diagrams, cost estimates, and earned value management. Where appropriate, sample files will be provided in the application software appropriate for the tool. For example, Microsoft Project files will be available to show sample work breakdown structures, Gantt charts, network diagrams, cost estimates, and applications of earned value management. Excel files will be available for sample cost estimates and earned value management charts.

5. Example applications of tools: The intranet site will include examples of real projects that have applied the tools listed in number 4 above.

6. Articles: The intranet site will include at least 10 useful articles about relevant topics in project management. The intranet site will have the capacity to store at least 1,000 articles in PDF format with an average length of 10 pages each.

7. Links: The intranet site will include links with brief descriptions for at least 20 useful sites. The links will be categorized into meaningful groups.

8. Expert database: In order to deliver an "Ask the Expert" feature, the system must include and access a database of approved experts and their contact information. Users will be able to search for experts by predefined topics.

9. User Requests feature: The intranet site will include an application to solicit and process requests from users.

10. Intranet site design: An initial design of the new intranet site will include a site map, suggested formats, and appropriate graphics. The final design will incorporate comments from users on the initial design.

11. Intranet site content: The intranet site will include content for the templates and tools sections, articles section, article retrieval section, links section, "Ask the Expert" section, User Requests feature, security, and payment features.

12. Test plan: The test plan will document how the intranet site will be tested, who will do the testing, and how bugs will be reported.

13. Promotion: A plan for promoting the intranet site will describe various approaches for soliciting inputs during design. The promotion plan will also announce the availability of the new intranet site.

14. Project benefit measurement plan: A project benefit plan will measure the financial value of the intranet site.

Project Success Criteria: Our goal is to complete this project within six months for no more than $140,000. The project sponsor, Joe Fleming, has emphasized the importance of the project paying for itself within one year after the intranet site is complete. To meet this financial goal, the intranet site must have strong user inputs. We must also develop a method for capturing the benefits while the intranet site is being developed and tested, and after it is rolled out. If the project takes a little longer to complete or costs a little more than planned, the firm will still view it as a success if it has a good payback and helps promote the firm's image as an excellent consulting organization.

Work Breakdown Structure

1.0 Initiating
     1.1 Identify key stakeholders
     1.2 Prepare project charter
     1.3 Hold project kick-off meeting
2.0 Planning
     2.1 Hold team planning meeting
     2.2 Prepare team contract
     2.3 Prepare scope statement
     2.4 Prepare WBS
     2.5 Prepare schedule and cost baseline
          2.5.1 Determine task resources
          2.5.2 Determine task durations
          2.5.3 Determine task dependencies
          2.5.4 Create draft Gantt chart
          2.5.5 Review and finalize Gantt chart
     2.6 Identify, discuss, and prioritize risks

3.0 Executing

    3.1 Survey

    3.2 User inputs

    3.3 Intranet site content

        3.3.1 Templates and tools

        3.3.2 Articles

        3.3.3 Links

        3.3.4 Ask the Expert

        3.3.5 User requests feature

    3.4 Intranet site design

    3.5 Intranet site construction

    3.6 Intranet site testing

    3.7 Intranet site promotion

    3.8 Intranet site roll-out

    3.9 Project benefits measurement

4.0 Monitoring and Controlling
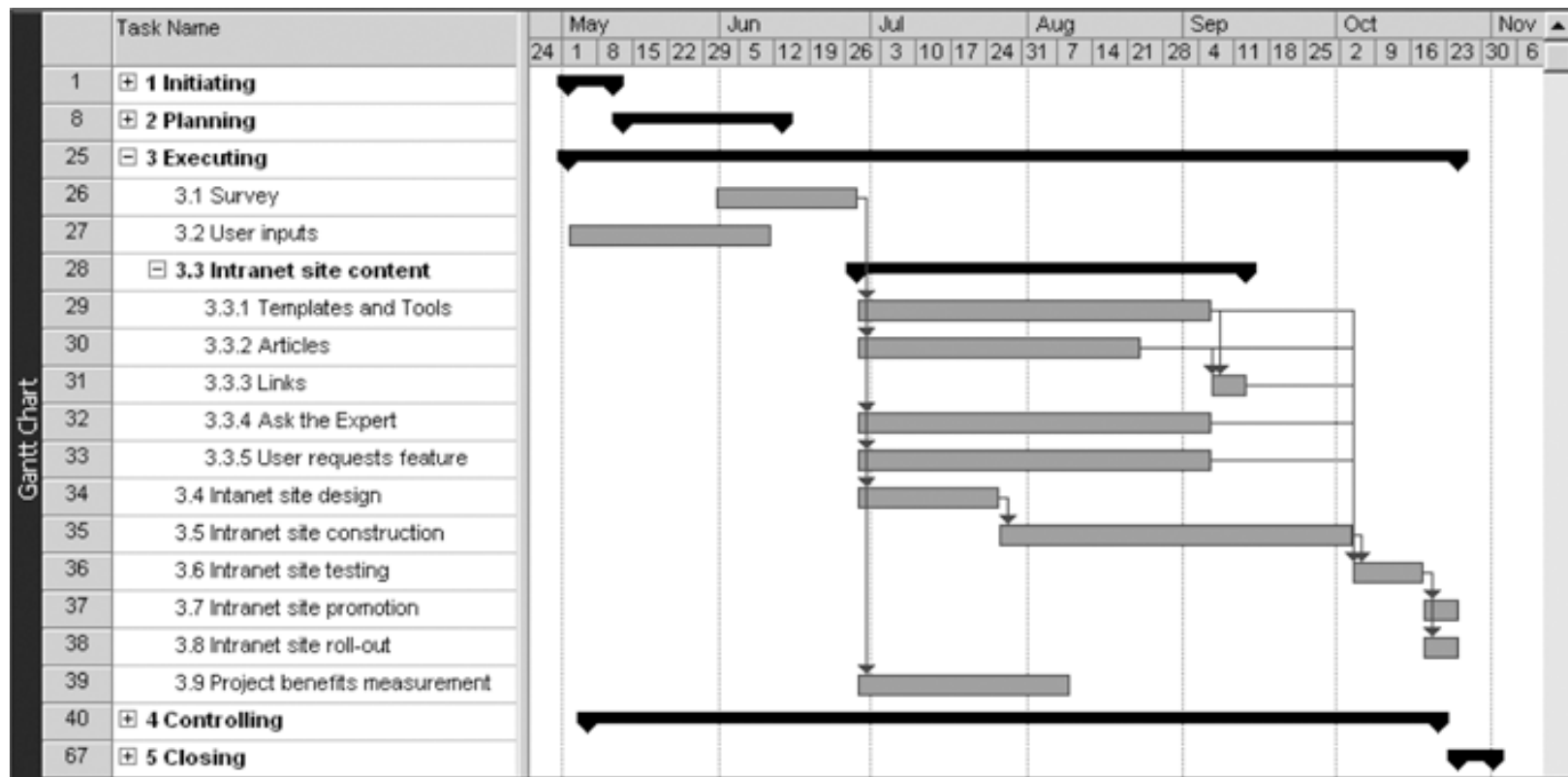
    4.1 Progress reports

5.0 Closing

    5.1 Prepare final project report

    5.2 Prepare final project presentation

    5.3 Lessons learned

JWD Consulting Intranet Site Project Baseline Gantt Chart

List of Prioritized Risks

Ranking	Potential Risk
1	Lack of inputs from internal consultants
2	Lack of inputs from client representatives
3	Security of new system
4	Outsourcing/purchasing for the article retrieval and "Ask the Expert" features
5	Outsourcing/purchasing for processing online payment transactions
6	Organizing the templates and examples in a useful fashion
7	Providing an efficient search feature
8	Getting good feedback from Michael Chen and other senior consultants
9	Effectively promoting the new system
10	Realizing the benefits of the new system within one year

Project Executing

Project Executing

Usually takes the most time and resources to perform project execution

Project managers must use their leadership skills to handle the many challenges that occur during project execution

Executing processes and outputs

Knowledge Area	Executing Process	Outputs
Project Integration Management	Direct and manage project work	Deliverables Work performance data Change requests Project management plan updates Project documents updates
Project Quality Management	Perform quality assurance	Change requests Project management plan updates Project documents updates Organizational process assets updates

Project Human Resource Management	Acquire project team	Project staff assignments
		Resource calendars
		Project management plan updates
	Develop project team	Team performance assessments
		Enterprise environmental factor updates
	Manage project team	Change requests
		Project management plan updates
		Project documents updates
		Enterprise environmental factors updates
		Organizational process assets updates
Project Communications Management	Manage communications	Project communications
		Project documents updates
		Project management plan updates
		Organizational process assets updates

Project Procurement Management	Conduct procurements	Selected sellers
		Agreements
		Resource calendars
		Change requests
		Project management plan updates
		Project documents updates
Project Stakeholder Management	Manage stakeholder engagement	Issue log
		Change requests
		Project management plan updates
		Project documents updates
		Organizational process assets updates

Part of Milestone Report

Milestone	Date	Status	Responsible	Issues/Comments
Initiating				
Stakeholders identified	May 2	Completed	Erica and Joe	
Project charter signed	May 10	Completed	Erica	
Project kick-off meeting held	May 13	Completed	Erica	Went very well
Planning				
Team contract signed	May 13	Completed	Erica	
Scope statement completed	May 27	Completed	Erica	
WBS completed	May 31	Completed	Erica	
List of prioritized risks completed	June 3	Completed	Erica	Reviewed with sponsor and team
Schedule and cost baseline completed	June 13	Completed	Erica	

Executing

Survey completed	June 28	Erica	Poor response so far!
Intranet site design completed	July 26	Kevin	
Project benefits measurement completed	August 9	Erica	
User inputs collected	August 9	Jessie	
Articles completed	August 23	Jessie	
Templates and tools completed	September 6	Erica	
Ask the Expert completed	September 6	Michael	
User Requests feature completed	September 6	Cindy	
Links completed	September 13	Kevin	
Intranet site construction completed	October 4	Kevin	
Intranet site testing completed	October 18	Cindy	

Intranet site roll-out completed	October 25	Kevin
Monitoring and Controlling		
Progress reports	Every Friday	All
Closing		
Final project presentation completed	October 27	Erica
Sponsor sign-off on project completed	October 27	Joe
Final project report completed	October 28	Erica
Lessons-learned reports submitted	November 1	All

Project Monitoring and Controlling

Project Monitoring and Controlling

Involves measuring progress toward project objectives, monitoring deviation from the plan, and taking correction actions

Affects all other process groups and occurs during all phases of the project life cycle

Outputs include performance reports, requested changes, and updates to various plans

Monitoring and controlling processes and outputs

Knowledge Area	Monitoring and Controlling Process	Outputs
Project Integration Management	Monitor and control project work	Change requests Work performance reports Project management plan updates Project documents updates
	Perform integrated change control	Approved change requests Change log Project management plan updates Project documents updates
Project Scope Management	Validate scope	Accepted deliverables Change requests Work performance information Project documents updates

	Control scope	Work performance information
		Change requests
		Project management plan updates
		Project documents updates
		Organizational process assets updates
Project Time Management	Control schedule	Work performance information
		Schedule forecasts
		Change requests
		Project management plan updates
		Project documents updates
		Organizational process assets updates
Project Cost Management	Control cost	Work performance information
		Cost forecasts
		Change requests
		Project management plan updates
		Project documents updates
		Organizational process assets updates
Project Quality Management	Control quality	Quality control measurements
		Validated changes
		Validated deliverables
		Work performance information
		Change requests
		Project management plan updates
		Project documents updates
		Organizational process assets updates

Project Communications Management	Control communications	Work performance information
		Change requests
		Project documents updates
		Organizational process assets updates
Project Risk Management	Control risks	Work performance information
		Change requests
		Project management plan updates
		Project documents updates
		Organizational process assets updates
Project Procurement Management	Control procurements	Work performance information
		Change requests
		Project management plan updates
		Project documents updates
		Organizational process assets updates
Project Stakeholder Management	Control stakeholder engagement	Work performance information
		Change requests
		Project documents updates
		Organizational process assets updates

Sample weekly progress report

Project Name: Project Management Intranet Project

Team Member Name: Cindy Dawson, cindy_dawson@jwdconsulting.com

Date: August 5

Work completed this week:

– Worked with Kevin to start the intranet site construction

– Organized all the content files

– Started developing a file naming scheme for content files

– Continued work on "Ask the Expert" and User Requests features

– Met with preferred supplier

– Verified that their software would meet our needs

– Discovered the need for some customization

Work to complete next week:

–Continue work on intranet site construction

–Prepare draft contract for preferred supplier

–Develop new cost estimate for outsourced work

What's going well and why:

The intranet site construction started well. The design was very clear and easy to follow. Kevin really knows what he's doing.

What's not going well and why:

It is difficult to decide how to organize the templates and examples. Need more input from senior consultants and clients.

Suggestions/Issues:

–Hold a special meeting to decide how to organize the templates and examples on the intranet site.

–Get some sample contracts and help in negotiating with the preferred supplier.

Project changes:

I think we can stay on schedule, but it looks like we'll need about $10,000 more for outsourcing. That's doubling our budget in that area.

Project Closing

Project Closing

Involves gaining stakeholder and customer acceptance of the final products and services

Even if projects are not completed, they should be closed out to learn from the past

Outputs include project archives and lessons learned, part of organizational process assets

Most projects also include a final report and presentation to the sponsor/senior management

Closing processes and output

Knowledge Area	Closing Process	Outputs
Project Integration Management	Close project or phase	Final product, service, or result transition Organizational process assets updates
Project Procurement Management	Close procurements	Closed procurements Organizational process assets updates

Lessons-learned report (abbreviated)

Project Name:	JWD Consulting Project Management Intranet Site Project
Project Sponsor:	Joe Fleming
Project Manager:	Erica Bell
Project Dates:	May 2 – November 4
Final Budget:	$150,000

1. Did the project meet scope, time, and cost goals?

   We did meet scope and time goals, but we had to request an additional $10,000, which the sponsor did approve.

2. What were the success criteria listed in the project scope statement?

Below is what we put in our project scope statement under project success criteria:

"Our goal is to complete this project within six months for no more than $140,000. The project sponsor, Joe Fleming, has emphasized the importance of the project paying for itself within one year after the intranet site is complete. To meet this financial goal, the intranet site must have strong user input. We must also develop a method for capturing the benefits while the intranet site is being developed and tested, and after it is rolled out. If the project takes a little longer to complete or costs a little more than planned, the firm will still view it as a success if it has a good payback and helps promote the firm's image as an excellent consulting organization."

3. Reflect on whether you met the project success criteria.

As stated above, the sponsor was not too concerned about going over budget as long as the system would have a good payback period and help promote our firm's image. We have already documented some financial and image benefits of the new intranet site. For example, we have decided that we can staff the PMO with one less person, resulting in substantial cost savings. We have also received excellent feedback from several of our clients about the new intranet site.

4. In terms of managing the project, what were the main lessons your team learned from this project?

The main lessons we learned include the following:

- *Having a good project sponsor was instrumental to project success. We ran into a couple of difficult situations, and Joe was very creative in helping us solve problems.*
- *Teamwork was essential. It really helped to take time for everyone to get to know each other at the kick-off meeting. It was also helpful to develop and follow a team contract.*
- *Good planning paid off in execution. We spent a fair amount of time developing a good project charter, scope statement, WBS, schedules, and so on. Everyone worked together to develop these planning documents, and there was strong buy-in.*
- *Project management software was very helpful throughout the project.*

5. Describe one example of what went right on this project.

6. Describe one example of what went wrong on this project.

7. What will you do differently on the next project based on your experience working on this project?

Final project report table of contents

1. Project Objectives
2. Summary of Project Results
3. Original and Actual Start and End Dates
4. Original and Actual Budget
5. Project Assessment (Why did you do this project? What did you produce? Was the project a success? What went right and wrong on the project?)
6. Transition Plan
7. Annual Project Benefits Measurement Approach

Attachments:

A. **Project Management Documentation**

- Business case
- Project charter
- Team contract
- Scope statement
- WBS and WBS dictionary
- Baseline and actual Gantt chart
- List of prioritized risks
- Milestone reports
- Progress reports
- Contract files
- Lessons-learned reports
- Final presentation
- Client acceptance form

B. **Product-Related Documentation**

- Survey and results
- Summary of user inputs
- Intranet site content
- Intranet site design documents
- Test plans and reports
- Intranet site promotion information
- Intranet site roll-out information
- Project benefits measurement information