Chapter 3: The Project Management Process Groups: A Case Study

Information Technology Project Management, Sixth Edition

Note: See the text itself for full citations.

Announcements

- Term project submission due 9/9 10 pm.

First Half Semester breakdown

- ~~8/25 – Chapter 1, Syllabus and Class Overview~~
- ~~9/1 – Chapter 2, Term Project Guidance, Team Breakouts~~
- 9/8 – Chapter 3, Team Breakouts
- 9/15 – Chapter 4, Team Breakouts
- 9/22 – Chapter 5, Team Breakouts
- 9/29 – No Class, Thursday follows Monday schedule….
- 10/6 – Chapter 6, Team Breakouts
- 10/13 – Midterm (chapters 1-6)
- 10/20 – 1st Team Presentations, due and presented.

Learning Objectives

- We'll describe the five project management (PM) process groups
  - And the typical level of activity for each, and the interactions among them
- We'll go over how the PM process groups relate to the PM knowledge areas
- We'll discuss how organizations develop information technology PM methodologies to meet their needs

Learning Objectives (continued)

- For each process group, we'll describe outputs of each process group;
- And go over the contribution that effective project
  - initiating,
  - planning,
  - executing,
  - monitoring,
  - and closing make to *project success!*

Project Management Process Groups

- To understand the 5 PM Process Groups, you must know what a process is.

- A **process** is a series of actions or steps directed toward a particular result.
  - Example: this is my process for making jam!
    1. Step 1 blah blah blah
    2. Step 2 blah blah blah
    3. Etc……

The 5 Project Management Process Groups

- The project management process groups include:

1) Initiating processes – *defining or authorizing a project or phase*

2) Planning processes – *devising a workable initial scheme cost plans, resource plans, procurement plans. – Note: planning can also happen in other processes as things might change, adjust….*

3) Executing processes – *coordinating people and other resources to carry out activities, actually doing the work – did you make that order?*

4) Monitoring and controlling processes – *measure progress and changes against the plans*

5) Closing processes – *formal signoff, lessons learned, close out contracts*

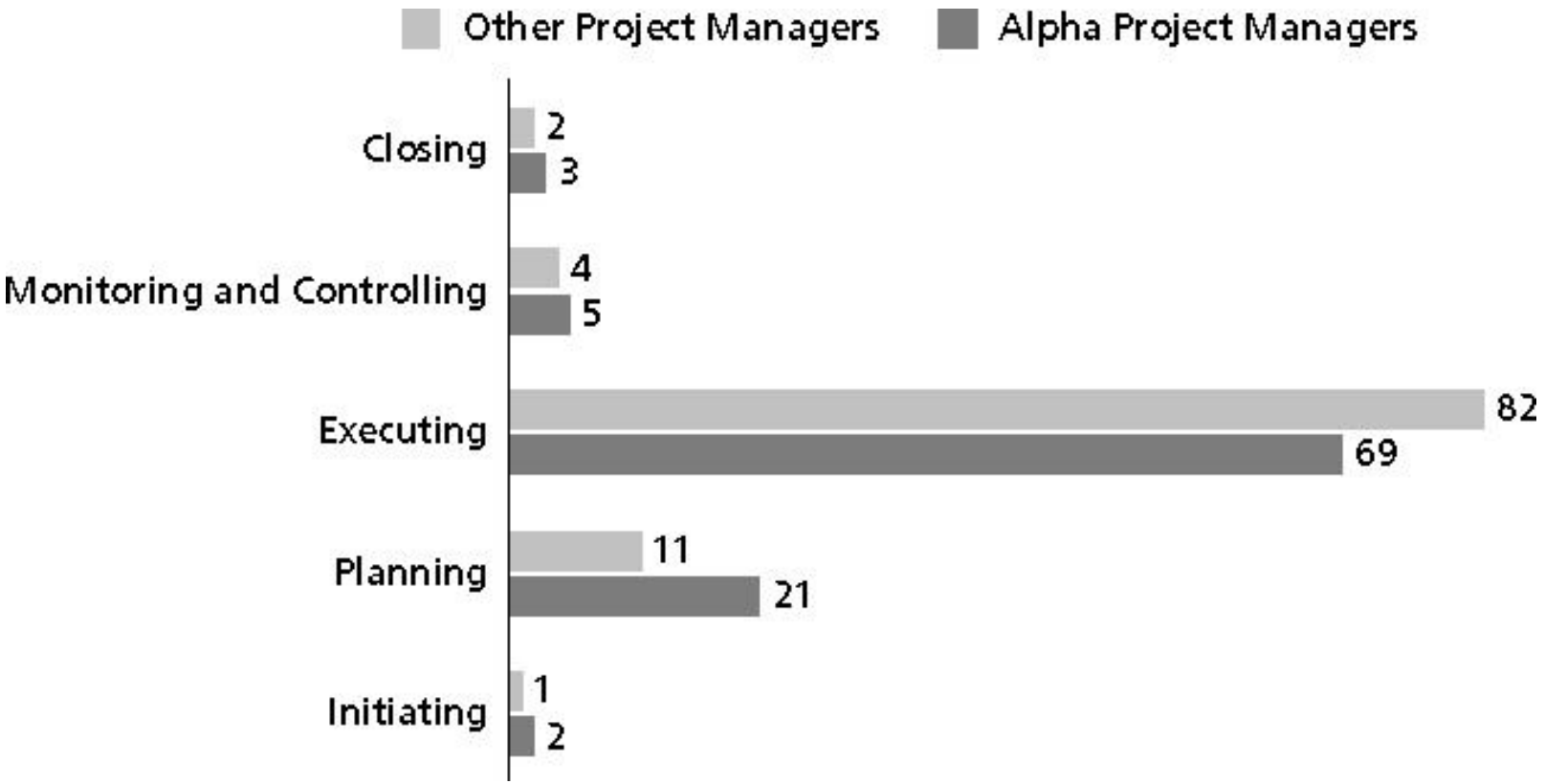
Movie / Technology Analogy of the 5 PM Process Groups

Processes involved in making movies might include:

- screenwriting (initiating)
- producing (planning)
- acting and directing (executing)
- editing (monitoring and controlling)
- releasing the movie to theaters (closing)

Project managers in any field know how important it is to follow a good process.

Figure 3-1. Percentage of Time Spent on Each Process Group



Mapping the Process Groups to the Knowledge Areas

- Lets map the main activities of each PM process group into the nine knowledge areas

Figure 1-2 Project Management Framework

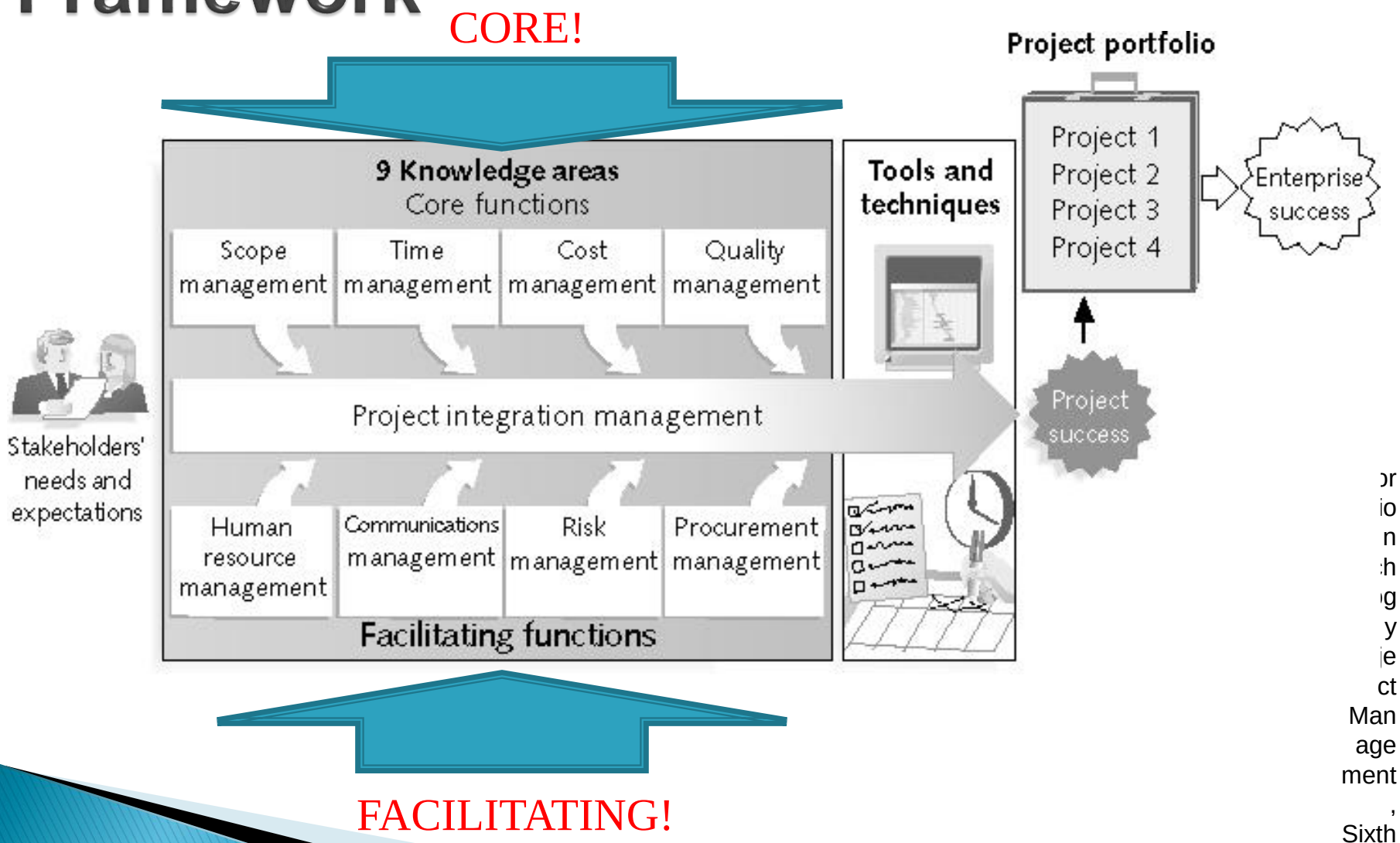


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Table 3-1. Project Management Process Groups and Knowledge Area Mapping*

Knowledge Area	Project Management Process Groups				
	Initiating	Planning	Executing	Monitoring and Controlling	Closing
Project Integration Management	Develop project charter	Develop project management plan	Direct and manage project execution	Monitor and control project work, Perform integrated change control	Close project or phase
Project Scope Management		Collect requirements, Define scope, Create WBS		Verify scope, Control scope	
Project Time Management		Define activities, Sequence activities,		Control schedule	

*Source: PMBOK® Guide, Fourth Edition, 2008.

Table 3-1. (continued)

Knowledge Area	Project Management Process Groups				
	Initiating	Planning	Executing	Monitoring and Controlling	Closing
Project Time Management (continued)		Estimate activity resources, Estimate activity durations, Develop schedule			
Project Cost Management		Estimate costs, Determine budget		Control costs	
Project Quality Management		Plan quality	Perform quality assurance	Perform quality control	
Project Human Resource Management		Develop human resource plan	Acquire project team, Develop project team, Manage project team		

Table 3-1 (continued)

Knowledge Area	Project Management Process Groups				
	Initiating	Planning	Executing	Monitoring and Controlling	Closing
Project Communications Management	Identify stakeholders	Plan communications	Distribute information, Manage stakeholders expectations	Report performance	
Project Risk Management		Plan risk management, Identify risks, Perform qualitative risk analysis, Perform quantitative risk analysis, Plan risk responses		Monitor and control risks	
Project Procurement Management		Plan procurements	Conduct procurements	Administer procurements	Close procurements

Developing an IT Project Management Methodology

- Just as projects are unique, so are approaches to project management. Many organizations develop their own project management methodologies for what works for them

- A **methodology** describes *how* things should be done. What processes, forms, intake etc…

- PMBOK is based on the 5 processes groups, fancy way of saying, here is a framework we like to follow.

What Went Right?

- AgênciaClick, an interactive advertising and online communications company based in São Paulo, Brazil, made PMI's list of outstanding organizations in project management.
- The company saw revenues jump 132 percent, primarily due to their five-year emphasis on practicing good project management across the entire company

Project Pre-initiation

- It is good practice to lay the groundwork for a project before it officially starts!
- Senior managers often perform several pre-initiation tasks, including the following:
  - Determine High Level scope, time, and cost constraints for the project
  - Identify the project sponsor
  - Select the project manager
  - Develop a business case for a project (see Table 3-2 for an example)
  - Meet with the project manager to review the process and expectations for managing the project

Project Initiation

- Initiating a project includes recognizing and starting a new project or project phase
- The main goal is to formally select and start off projects

TABLE 3-3 Project initiation knowledge areas, processes, and outputs

Knowledge Area	Initiating Process	Outputs
Project Integration Management	Develop project charter	Project charter
Project Communications Management	Identify stakeholders	Stakeholder register Stakeholder management strategy

Table 3-4. Stakeholder Register

Name	Position	Internal/ External	Project Role	Contact Information
Joe Fleming	CEO	Internal	Sponsor	joe_fleming@jwdconsulting.com
Erica Bell	PMO Director	Internal	Project manager	erica_bell@jwdconsulting.com
Michael Chen	Team member	Internal	Team member	michael_chen@jwdconsulting.com
Kim Phuong	Business analyst	External	Advisor	kim_phuong@client1.com
Louise Mills	PR Director	Internal	Advisor	louise_mills@jwdconsulting.com

Table 3-4. Stakeholder Management Strategy

Name	Level of Interest	Level of Influence	Potential Management Strategies
Joe Fleming	High	High	Joe likes to stay on top of key projects and make money. Have a lot of short, face-to-face meetings and focus on achieving the financial benefits of the project.
Louise Mills	Low	High	Louise has a lot of things on her plate, and she does not seem excited about this project. She may be looking at other job opportunities. Show her how this project will help the company and her resume.

Contents are often sensitive, so do not publish this document.

Project Charters and Kick-off Meetings

- See Table 3-6 for an example of a charter
- Charters are normally short and include key project information and stakeholder signatures
- It's good practice to hold a **kick-off meeting** at the beginning of a project so that stakeholders can meet each other, review the goals of the project, and discuss future plans

Figure 3-2. Kick-off Meeting Agenda

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

- The main purpose of project planning is to *guide execution*
- Every knowledge area includes planning information (see Table 3-7 on pages 97-98)
- Key outputs included in projects include:
  - A team contract
  - A project scope statement
  - 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)
- See sample documents on pages 100-107

Figure 3-4. JWD Consulting Intranet Site Project Baseline Gantt Chart

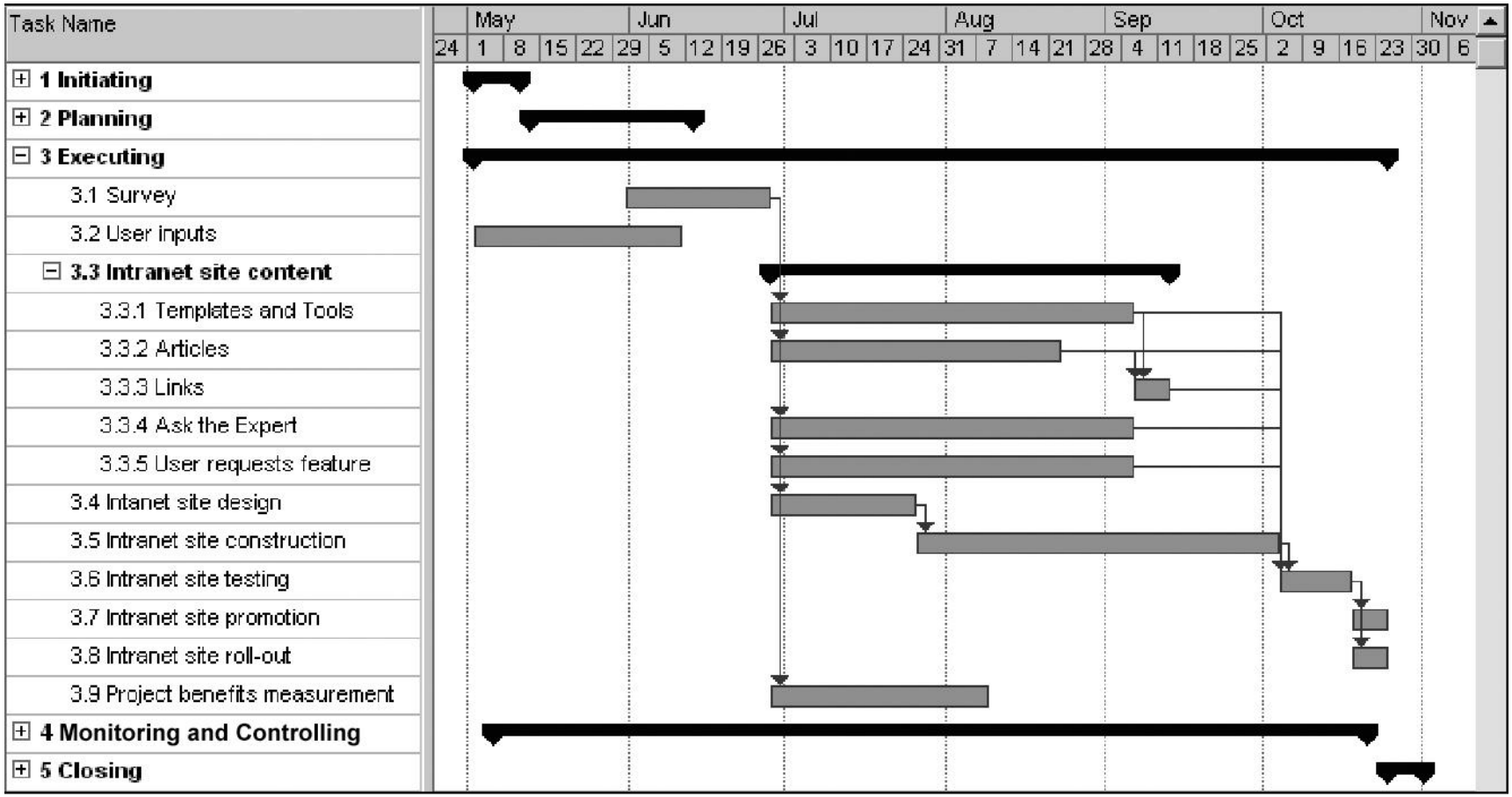

Table 3-10. List of Prioritized Risks

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

- 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
- Table 3-11 on p. 108 lists the executing processes and outputs; many project sponsors and customers focus on deliverables related to providing the products, services, or results desired from the project
- A milestone report (example on pp. 109-110) can help focus on completing major milestones

Part of Milestone Report (Table 3-12)

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 Monitoring and Controlling

- Project Monitoring - 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, change requests, and updates to various plans
- See Table 3-13

Project Closing

- Project Closure - involves gaining stakeholder and customer acceptance of the final products/services
- Even if projects are not completed (killed), they should be closed out to learn from the past
- Outputs include project archives and lessons learned, part of organizational process assets
- Most projects include a final report and presentation

Templates

- Table 3-18 on pp. 118-121 lists the templates available on the companion Web site, the author's site (www.kathyschwalbe.com)
- Use this link to view all templates: http://www.cengagebrain.com/cgi-wadsworth/course_products_wp.pl?fid=M20b&product_isbn_issn=9781111221751&token=