

# Project Management Foundations – PMI *PMBOK*® Guide 4<sup>th</sup> Edition - Step by Step (General Overview: Page 43)

PMI and PMBOK Guide are registered marks of the Project Management Institute, Inc. ©2011 Robertson Consulting Ltd

## INITIATION (*PMBok*® Guide p. 44, 71)

### Project INTEGRATION Management

#### Develop Project Charter (p. 45, 73-77)

1. **Create and SIGN OFF Project Charter**

### Project Communications Management (PMBok p. 243)

2. IDENTIFY STAKEHOLDERS (p. 246)

## PLANNING (*PMBok*® Guide p. 46)

### Project SCOPE Management (p. 103)

1. Collect REQUIREMENTS (start **Traceability Matrix**) (p. 105, 111)
2. Define SCOPE (p.112)
3. Create WBS (p. 116)

### Project Time Management (p. 129)

4. Define and Sequence ACTIVITIES - ACTIVITY LIST (p. 129, 133, 136)
5. Estimate Activity RESOURCES (p. 141)
6. Estimate Activity DURATIONS (p. 146)
7. Develop Schedule (p. 152)

### Project Cost Management (p. 165)

8. Estimate COSTS (p. 174)
9. Determine BUDGET (p. 174)

### Project Quality Management (p. 189)

10. Plan Quality (p. 192)

### Project HR Management (p. 215)

11. Develop HR Plan (p. 218)

### Project Communications Management (p. 243)

12. Plan Communications (p. 251)

### Project Risk Management (p. 273)

13. Plan Risk Management (p. 276)
14. Identify Risks (p. 282)
15. Perform Qualitative Risk Analysis (p. 289)
16. Perform Quantitative Risk Analysis (p. 294)
17. Plan Risk Responses (p. 301)

### Project Procurement Management (p. 313)

18. Plan Procurements (p. 316)

### Project Integration Management

19. **Develop PROJECT MANAGEMENT PLAN** (p. 78) and **GAIN SIGN OFF**

## PROJECT EXECUTION & CONTROL (*PMBok*® Guide p. 55, 59))

### Project Quality Management (p. 189)

1. Perform Quality Assurance (p. 203), Perform Quality Control (p. 206)

### Project HR Management (p. 215)

2. Acquire Project Team (p. 225), Develop Project Team (p. 229), Manage Project Team (p. 236)

### Project Communications Management (p.243)

3. Distribute Information (p. 258), Manage Stakeholder Expectations (p. 261), Report Performance (p. 266)

### Project Procurement Management (p. 313)

4. Conduct Procurements (p. 328), Administer Procurements (p. 335)

### Project Integration Management (p. 71)

5. Direct and Manage Project Execution (p. 83), Monitor and Control Project work (p. 89), Perform Integrated Change Control (p. 93)

### Project Scope Management (p. 103)

6. Verify SCOPE (p. 123), Control Scope (p. 125)

### Project Time Management (p. 129)

7. Control Schedule (p. 160)

### Project Cost Management (p. 165)

8. Control Costs (p. 179)

### Project Risk Management (p. 273)

9. Monitor and Control Risks (p. 308)

## Initiating - Answering Questions

1. **Do I have enough information to create the Project Charter?** Why this project is right to do now and will it deliver acceptable ROI? Do I understand: the project's purpose and justification, a description of the project that people will understand, the High Level Project and Product Requirements, a summary budget, initial risks, summary milestones, project objectives around scope, time, cost, quality and success criteria for each as well as who approves this, the project acceptance criteria, top level staffing requirements, the authority level of the project manager and decision making boundaries on Staffing (resourcing), budget management and variance from targeted budget, technical decisions, conflict resolution and escalation path for issues beyond these authority boundaries? Can I now put together **the Project Charter**? Have I the authority to start planning? **Is the Project Charter Signed off?**
2. Who are the interested, impacted, influential or involved stakeholders associated with this project? How can I best keep them on-board? (Stakeholder Analysis)

## Project Planning - Answering Questions

1. Do I understand all the requirements – have I the **TRUE** picture of what the Key Stakeholders really want? Is this agreed by all, especially the Sponsor? Have I a clear link between Requirements through to Work Packages to Deliverables to ensure we have covered and (later) delivered everything agreed in the SCOPE? Have I started **my Traceability matrix**?
2. What are the actual top level deliverables IN the Scope to achieve the agreed Requirements? In addition do I understand what deliverables are OUT of Scope (which might otherwise be expected as part of such a project delivery)?
3. **WBS:** Do I have a reliable Decomposition of **ALL that the SCOPE INCLUDES** starting with the Final Project Objective in Deliverable at the top with a hierarchical breakdown of all contributing Deliverables down to Work Package Level, described with action words in the past tense? Can those Work Packages get given to one person to manage? Have I also covered Project Management deliverables in the WBS?
4. Have I a clear breakdown of each Work Package's **activities/tasks**? Have I a clear idea of each Work Package's activities, and their dependencies?
5. Have I identified **who** will do the work (resources), their **availability** (%age per day)? Have I clarified all the other types of resource I will need to complete this task?
6. Have I a high level of confidence in the agreed effort estimate for each task, and ownership from the resources allocated to each task? Do I know the cost of each resource for costing purposes? Based on effort, number of resources, and their availability, do I understand the **duration** of each task? (Three Point estimates?)
7. Have I enough confidence in the project estimates and activities to develop a **project schedule**? How do I optimise the schedule to take account of project constraints and are the resources levelled correctly?
8. Based on the tasks, allocated resources, and their availability, any additional materials, machinery and supplies for the project, can I have confidence to estimate **the overall costs** for the project?
9. Do I have enough confidence in the schedule and resource plan to call out my **Project Budget**? Do I have a view on the overall budget required to deliver this project? Is it within original budget (Project Charter) tolerances for the project? Do I need to negotiate for more? Have I calculated the **COST PERFORMANCE Baseline**?
10. Do I know what measures I will take to assure and control the **quality** of project deliverables for this project? Do I have a clear plan in place to ensure all my end products are providing the quality and level of function/service required by the project requirements? Do I know what means I am using to measure project progress? Do I need to use **EVM**?
11. Do I know how I will **plan to resource** the project, identify the skills required and ensure I have the right skills for this project? Have I a plan to ensure the team moves towards being a **high performing team** and maintains its motivation and discipline throughout delivery? Does everyone know what their role is for each major deliverable (RACIS) and how the project team is organised?
12. Have I a clear **communication plan** ensuring all Stakeholders (use results of Stakeholder Analysis) are kept abreast of progress and are able to ask questions at appropriate points? Who, what, when and how? How am I going to ensure the team develops a regular discipline to report progress, issues and risks? How frequently am I going to report EVA results?
13. Do I have a robust **Risk Management Plan** – ensuring all team members and key stakeholders know how I will manage Risk – the process we will use? The steps the team will use to ensure risk is identified, analysed, planned and monitored, controlled, reported on, and regularly reviewed through the project? Do I have an Impact Definition Table and PI table?
14. Do know how I will identify the risks for this project and continue **to recognise new risks** throughout the project life cycle?
15. Do I have a grasp of all the top risks associated with this project, knowing their probability, severity of impact, their owners, and the risk exposure? Do I know how I will treat the risks? Does each risk and the associated **Response** (mitigation) actions each have an owner? Are the mitigation actions in my project activity list? Do I need to recommend Contingency (Risk Reserve) to cover the damage some risk may still cause should they happen? Do I need some modelling technique to increase accuracy in estimating Risk Reserve (Contingency)?
17. How am I going to analyse the risks to **identify causes and mitigation (response) actions** to reduce their probability and/or impact? Do they have Owners and due dates for each Response action? Are these in the Project Activity List? Have I considered what Reserve Actions I might have in place if the risk does still happen?
18. Have I determined how I will carry out the **supply of external resources** for the project? What is the procurement process? What external resources will I need and where will I get them?
19. Have I reached the point where I can confidently **"BASELINE" the Scope, Schedule and Budget** on the way to getting **sign off for the Project Management Plan**? Does the Project Management Plan provide a clear and concise documentation of ALL that will be done to ensure the project is a success and that it will be delivered in time and within budget? Can I now provide the Sponsor with a reasoned Project Plan schedule which covers all Project Deliverables? Has the Sponsor **signed off the Project Management Plan**?

## PROJECT EXECUTION & CONTROL - Answering Questions

1. How do I know whether the quality standards required have been met? (Audit) Have I identified any process improvement I can put in place? Are my deliverables to quality standards?
2. Am I happy that things are going to plan? What is happening on the ground? What is the **team spirit like**? Anyone struggling and need help? When was the last time we laughed?
3. How is the project doing on **progress against planned** Schedule, Budget and Scope? What is the progress on the WPs/tasks (especially Critical path ones)? When was the last time I spoke to the key stakeholders? What messages are out there about their expectations and the project?
4. Are **my suppliers delivering according to plan**? Are there any supply chain issues I need to address now? Are my dependencies safe?
5. Have we a grasp of the **key issues** we need to resolve? What is **status on the actions** to resolve? Any changes **or Change Requests** need addressing? Are changes under **Change Control**?
6. Am I convinced we have the **total scope traced to requirements**? Any indication of Scope creep? Have I tested all **assumptions** to be true?
7. Does **my schedule reflect reality**? Have I all the information required to send out reports according to my communication plan? Does everyone have a copy of the latest PM Plan?
8. What is **my burn rate**? What is my actual cost against budget looking like now and do I have **enough for the rest of the project**?
9. Have we **reviewed risk lately**, what has changed, have we missed any new risks? How are **the response mitigation actions progressing**?

## CLOSE DOWN (*PMBok*® Guide p. 99)

### Project INTEGRATION Management

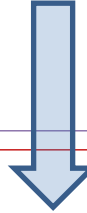
1. Handover deliverables (p. 101)
  2. **Gain Acceptance** and **SIGN OFF**
  3. Close Down Review, lessons learnt, assets
- ### Project Procurement Management (p. 313)
4. Close Procurements (p. 341)

## CLOSE DOWN - Answering Questions

1. Have I clear idea of the **handover process**? What deliverables are to be handed over? When and How? Do I have a line of traceability (**Traceability Matrix**)?
2. Are all **Acceptance Criteria** and **Success Criteria** met? Has my **customer or Sponsor signed off**? Complete?
3. Have I completed a **Close Down review**? Are there any actions required from the review? Have I a **Lessons Learnt log** to share with colleagues and future project managers? Have I **thanked everyone** and **recognise hard work**? **Celebrated that success**?
4. Have I **closed down suppliers** and thanked them? **Have I invited them to celebrate with us**?

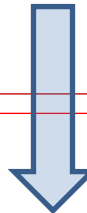
### Project Initiation

1. Identify and Analyse Stakeholders
2. Collect data for Project Charter
3. **Develop Project Charter**
4. Confirm with Sponsor and **get sign off**



### Project Planning (Scope, Time, Risk, Quality, HR, Communications, and Procurement Management)

5. Collect Requirements, verify with Stakeholders and develop Traceability Matrix
6. Define Scope
7. Create WBS and confirm with team
8. Plan Risk Management (good practice)
  - a. Identify Risks (Workshop)
  - b. Perform Qualitative and Quantitative Analysis
  - c. Plan Risks Responses
9. Break down WPs to Activity List
  - a. Define Activities
  - b. Sequence Activities
  - c. Estimate Activity Resources
  - d. Estimate Activity durations
10. Plan Quality
11. Develop HR Plan
12. Plan Communications
13. Plan Procurements

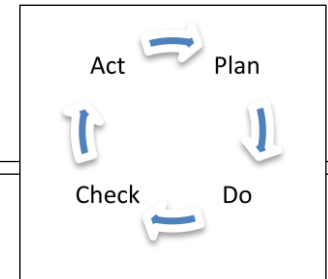
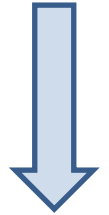


### Project Planning (Cost and Time Management)

14. Develop Schedule
15. Optimise Schedule
16. Estimate Project Costs
17. Determine Budget
18. **BASELINE Schedule, Scope and Budget**
19. **Develop Project Management Plan and get Sign Off**

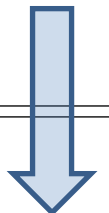
### Project Execution

20. Direct and Manage Project Execution
21. Execute HR plan
  - a. Acquire Project Team
  - b. Develop Project Team
  - c. Manage Project Team
22. Execute Communications plan
  - a. Collect information
  - b. Distribute information
  - c. Manage Stakeholder expectations
23. Execute Quality Plan
  - a. Perform Quality Assurance
24. Execute Procurement
  - a. Conduct Procurements



### Project Monitoring and Control

25. Monitor and Control Project work
26. Verify Scope and Control Scope
27. Control Schedule
28. Control Costs
29. Perform Quality Control
30. Report Performance
31. Monitor and Control Risks
32. Administer Procurements
33. Perform Integrated Change Control



### Project Close Down

34. Close Project or Phase
  - a. Hand over Deliverables and **gain Acceptance Sign Off**
  - b. Hold Project Review (Lessons Learnt)
  - c. Celebrate and reward success, then Release Resources
35. Close Procurements