

PROJECT MANAGEMENT CONSIDERATIONS – CHAPTER 4 INTEGRATION

Consider the concepts of tailoring, agile, trends or interpersonal skills discussed in the *PMBOK® Guide*, Chapter 4. Review the following scenario and define how you would apply one or more of these concepts.

You have just been made aware of a new initiative starting for your manufacturing company. Because of your excellent track record, you have been assigned as the project manager and asked to collaborate with the business stakeholders to develop the business case and to assist with calculating the business benefits. You are delighted to find out that the business analysts with whom you have an excellent working relationship has also been assigned to this project.

Your company is experiencing some pressure on their bottom line, so they are assembling a team of cross-functional top performers to the project. Senior management has high expectations that this project will increase revenue by 15%. To do that, you quickly realize that ensuring change is accepted by and transitioned to the line organization smoothly is crucial. Past experience has shown you that this has not always been the case, since there is often friction between the product development and the front-line operations management teams.

How can you use the concepts above from this chapter to facilitate transitioning to operations?

Additional question: What other strategies would you consider using as you begin to plan your project?

There are many options, so challenge yourself to consider something you aren't as familiar with. Discuss your thoughts with classmates and then review some of the suggested answers provided in the WAV downloadable files.

Suggested answers may include these concepts:

Tailoring – Since this project is critical to the company's financial success, acceptance by the line or operational management is crucial to achieve the target revenue. Identifying and planning an excellent change management plan will help to ensure a smooth transition to operations. Study lessons learned gleaned from previous projects, especially to identify barriers to acceptance. Using benefits realization techniques will be show benefits target early and leave room for adjustments if targets aren't on track. Consider incremental delivery to deliver some early successes. This will bring in some revenue early; incremental success also helps buy-in.

Agile/adaptive – Incremental delivery

Trends – Collaboration with stakeholders on business case; Business Analyst techniques for requirements management; using tools for identifying complexity; use techniques change management and transitioning into the organization

Interpersonal Techniques – Leadership, facilitation, conflict resolution, political awareness (to gain acceptance for change management)

PROJECT MANAGEMENT CONSIDERATIONS – CHAPTER 4 INTEGRATION

Notes from errata re Exam Content Outline

Additional considerations for discussion:

How will you plan and ensure that knowledge about the product and project are transferred to operations? Give specific examples.

How does knowledge transfer help ensure project success?

- Project Management Considerations – Integration (2.16.3, 2.6.6). The new exam content outline emphasizes the concept of knowledge transfer. The considerations scenario in this chapter applies to enabler, 2.16, Ensure knowledge transfer for project continuity, and especially the new enabler, 2.16.3, Confirm approach for knowledge transfers.
- To extend the question about facilitating transitioning to operations, ask yourself: How will you plan and ensure that knowledge about the product and project are transferred to operations? Give specific examples.
- Pay attention to related enabler - 2.6.6, Coordinate with operations. How does knowledge transfer help ensure project success?

PROJECT MANAGEMENT CONSIDERATIONS - CHAPTER 5 SCOPE

Consider the concepts of tailoring, agile, trends or interpersonal skills discussed in the *PMBOK® Guide*, Chapter 5. Review the following scenario and define how you would apply one or more of these concepts.

You are a project manager for new, strategic product for your company – a leading edge bio-technology startup company. The product uses artificial intelligence to help home care professionals quickly assess life threatening health risks from falling. Until now, your projects were enhancements to existing products, so a project to launch a new product is new. The product manager is a recent hire, but has deep industry experience. However, you aren't certain if the rest of the stakeholders you have identified have very much experience in launching a new product of this scope.

How can you use the concepts above from this chapter to gather requirements for the scope of this new project which likely change throughout the project?

There are many options, so challenge yourself to consider something you aren't as familiar with. Discuss your thoughts with classmates and then review some of the suggested answers provided in the WAV downloadable files.

Suggested answers may include these concepts:

Tailoring – Requirements are likely to be in flux, or unstable, in this scenario. Therefore, a lean or agile would be an appropriate tailoring approach for scope. This industry is highly regulated, so an understanding of the policies, procedures, guidelines and controls – both internal and external - are critical to tailoring.

Agile/adaptive – Emerging requirements apply themselves to agile techniques like prototyping. Scope likely will be continuously refined throughout the project, requiring iterative release versions. Requirement backlog as a scope technique.

Trends – Eliciting requirements will be critical skills as well as collaborative partnerships with the business analyst and stakeholders. Having a highly experience and knowledgeable business analyst assigned to the project is highly desirable for success.

Interpersonal – Facilitation and negotiation

Notes from errata re Exam Content Outline

Additional consideration for discussion:

What project lifecycle would you recommend for this project to deliver value incrementally? Explain why you would use this approach.

- Project Management Considerations – Scope (2.1.1). The scenario lends itself to discuss enabler 2.1.1, Assess opportunities to deliver value incrementally. Related enablers that should be brought in are: 2.13.3 and 2.13.4 – recommending a methodology and using interactive practices.

PROJECT MANAGEMENT CONSIDERATIONS - CHAPTER 6 SCHEDULE

Consider the concepts of tailoring, agile, trends or interpersonal skills discussed in the *PMBOK® Guide*, Chapter 6. Review the following scenario and define how you would apply one or more of these concepts.

Building on the scenario from Chapter 5, Scope, you are starting to work on the schedule for your project which is for a new, strategic product for your company – a leading edge bio-technology startup - to help home care professionals quickly assess life threatening health risks from falling.

Since the product uses artificial intelligence, you realize that your development team does not have extensive experience and there will be a learning curve. You also see that the scope is unpredictable and that the sponsor and business stakeholders are continually revamping and refining requirements. You have an initial plan, but anticipate the priorities may change. You also anticipate resource constraints will impact your plan.

How would you apply the concepts learned to create your project schedule?

There are many options, so challenge yourself to consider something you aren't as familiar with. Discuss your thoughts with classmates and then review some of the suggested answers provided in the WAV downloadable files.

Suggested answers may include these concepts:

Tailoring – Uncertain and unpredictable projects benefit from adaptive schedule planning. In this case, the trends and agile techniques work together.

Agile/adaptive – Short cycles, review results and adapt using the schedule planning techniques under trends.

Trends – An adaptive technique that also balances the demand of the work against the ability of the team to produce deliverables is on-demand scheduling. Another technique that could be considered is iterative technique with backlog. Both techniques would be applicable to the scenario of unpredictability and resource constraints.

Interpersonal Techniques – Facilitation, decision-making, leadership, conflict management

PROJECT MANAGEMENT CONSIDERATIONS - CHAPTER 7 COST

Consider the concepts of tailoring, agile, trends or interpersonal skills discussed in the *PMBOK® Guide*, Chapter 7. Review the following scenario and define how you would apply one or more of these concepts.

Building on the scenario from Chapter 4, Integration, while collaborating with the stakeholders for your manufacturing company's new revenue producing product, you realize that containing cost will be an overriding constraint. You know you will be held to a strict budget. Currently, your PMO has methodology in place for Earned Value Management. However, you feel that more could be done to forecast project completion dates more precisely.

How would you apply the concepts learned to create your project schedule?

There are many options, so challenge yourself to consider something you aren't as familiar with. Discuss your thoughts with classmates and then review some of the suggested answers provided in the WAV downloadable files.

Suggested answers may include these concepts:

Tailoring – Earned Value Management (EVM) is a good tool to implement, especially to be able to use the forecasting capabilities

Agile/adaptive – Strict budget to hold to bottom line; scope and schedule are often adjusted to stay within cost constraints.

Trends – Earned schedule can be used to forecast project completion dates.

Interpersonal Techniques – Facilitation, negotiation, conflict, team-building

PROJECT MANAGEMENT CONSIDERATIONS - CHAPTER 8 QUALITY

Consider the concepts of tailoring, agile, trends or interpersonal skills discussed in the *PMBOK® Guide*, Chapter 8. Review the following scenario and define how you would apply one or more of these concepts.

You work in the Information Technology (IT) department as a project manager for a leading financial institution. Your new project is for an upgrade to increase the amount of transactions that can be processed at one of your older data center sites. Due to heavy industry regulations, quality of the data is of utmost importance. Data quality and security protection are of over-riding importance to meet your customer's expectations to keep data safe and maintain the high reputation of the company.

Some of the components will be provided by one of your suppliers. You check on the history with this supplier and find some relatively minor quality issues in the past, however vendor management has worked closely with the supplier and has resolved past issues.

How can you use the concepts above from this chapter to plan quality into the project to meet stakeholder and industry expectations?

There are many options, so challenge yourself to consider something you aren't as familiar with. Discuss your thoughts with classmates and then review some of the suggested answers provided in the WAV downloadable files.

Suggested answers may include these concepts:

Tailoring – These tailoring techniques apply to a highly regulated industry where data security is a primary requirement: scheduling policy compliance and audits are critical; use proven organization templates and lessons learned; engage standard and regulatory compliance expertise; use continuous improvement to test quality; plan stakeholder engagement, especially for the supplier relationship to ensure no new quality issues; include vendor management and contract specialist on team; implement a robust audit schedule

Agile/adaptive – Frequent quality reviews, review steps; recurring retrospectives; trials of new approach/changes to improve quality

Trends – Consider continuous improvement techniques and bringing in a contract specialist early in the project to establish a mutually beneficial partnership with suppliers.

Interpersonal Techniques – Active listening, observation, political awareness, conflict management, leadership

PROJECT MANAGEMENT CONSIDERATIONS - CHAPTER 9 RESOURCE

Consider the concepts of tailoring, agile, trends or interpersonal skills discussed in the *PMBOK® Guide*, Chapter 9. Review the following scenario and define how you would apply one or more of these concepts.

Building on the scenario described in Chapter 4, Integration, you are considering the project team resources you will need for your manufacturing product project. As you continue to assemble your cross-functional team of top performers, ideally you would like your team to be co-located. However, that approach is not realistic since your team is spread world-wide.

How can you use the concepts above from this chapter to get this team of high performers to perform well together quickly?

There are many options, so challenge yourself to consider something you aren't as familiar with. Discuss your thoughts with classmates and then review some of the suggested answers provided in the WAV downloadable files.

Suggested answers may include these concepts:

Tailoring – Collaboration, supportive, emotional intelligence, self-organizing a possibility, techniques for virtual teams

Agile/adaptive – Establishing a self-organizing team and fostering a collaborative environment

Trends – Foster collaborative and supportive working environment/relationships; use a variety of communication technologies to benefit virtual/distributed teams

Interpersonal Techniques – Leadership, political awareness, conflict management, leadership, emotional intelligence, influencing, team building

PROJECT MANAGEMENT CONSIDERATIONS - CHAPTER 10 COMMUNICATIONS

Consider the concepts of tailoring, agile, trends or interpersonal skills discussed in the *PMBOK® Guide*, Chapter Review 10. the following scenario and define how you would apply one or more of these concepts.

Building on the scenario in Chapter 5, Scope, you are developing the communication plan for your new product to help home care professionals quickly assess life threatening health risks from falling. You identify several communication challenges you will need to solve and build into this plan, such as fast moving and ambiguous requirements, challenges that will arise from the new, evolving technology, and the need to be fully transparent to ensure everyone has the same information simultaneously.

How can you use the concepts above from this chapter to manage communications and develop your communication plan?

There are many options, so challenge yourself to consider something you aren't as familiar with. Discuss your thoughts with classmates and then review some of the suggested answers provided in the WAV downloadable files.

Suggested answers may include these concepts:

Tailoring – Consider communication technology that will enable full transparency

Agile/adaptive – With the challenges anticipated to arise, communicate quickly and more frequently; streamline check points, hold regular reviews. Be transparent and timely when posting status, updates and changes. Technology should support instantons and be able to provide immediate access to all stakeholders.

Trends – Include stakeholders in project reviews, hold regular and timely reviews, use social computing/networking or other advanced technology (for speed, transparency)

Interpersonal Techniques – Leadership, political awareness, conflict management, active listening

PROJECT MANAGEMENT CONSIDERATIONS - CHAPTER 11 RISK

Consider the concepts of tailoring, agile, trends or interpersonal skills discussed in the *PMBOK® Guide*, Chapter 11. Review the following scenario and define how you would apply one or more of these concepts.

Building on the scenario from Chapter 8, Quality, you are considering the effect of risk on your IT upgrade project which will increase the amount of transactions that can be processed at one of your older data center sites. Data quality, integrity and security protection are of over-riding importance to meet your customer's expectations to keep data safe and maintain the high reputation of the company. In addition, you need to consider that some of the components will be provided by one of your suppliers.

How can you use the concepts above to identify the skills and strategies you will need to plan and manage risk?

There are many options, so challenge yourself to consider something you aren't as familiar with. Discuss your thoughts with classmates and then review some of the suggested answers provided in the WAV downloadable files.

Suggested answers may include these concepts:

Tailoring – Complexity, robust risk approach, risk increases with strict industry standards – data integrity, security, and quality. Risk of reputation of company to consider and establish risk approaches. Risk related to vendor – tailor procedures to enhance monitoring and tracking, tailor quality procedures, include vendor management and supplier on team.

Agile/adaptive – Use small iterations to facilitate quality and reduce risk

Trends – Complexity, external vendor, risk of technology, prototyping or simulation

Interpersonal Techniques – Facilitation, negotiation, influencing

Notes from errata re Exam Content Outline

Additional considerations for discussion:

When planning risk to the project, pay particular attention to suppliers, which are a good example of an external business environment change. How will you identify, plan, and monitor risk of suppliers on the project?

What risk categories and potential threats are associated to this project? What approaches will you take to address the compliance and quality needs of this project?

- Project Management Considerations – Risk (3.3). The scenario lends itself to discuss the enablers associated with 3.3, Evaluate and address external business environment changes. Relate the new enabler - 3.3.4, Continually review external business environment for impacts on project scope/backlog – to this scenario.
- Compliance and quality are additional considerations for this scenario. Review the enablers under 3.1, Plan and manage project compliance.

PROJECT MANAGEMENT CONSIDERATIONS - CHAPTER 12 PROCUREMENT

Consider the concepts of tailoring, agile, trends or interpersonal skills discussed in the *PMBOK® Guide*, Chapter 12. Review the following scenario and define how you would apply one or more of these concepts.

Building on the scenario from Chapter 8, Quality, you are planning the components you need to procure for your data center upgrade project which will increase the number of transaction the site can process. The supplier has already been selected and you have information about their performance from the lessons learned repository which indicates that this supplier has had some relatively minor quality issues in the past. However, vendor management has worked closely with the supplier and has resolved past issues.

Using the concepts above, what procurement skills and strategies would you use to increase the success of procuring resources from your supplier and ensuring that you meet all project objectives?

There are many options, so challenge yourself to consider something you aren't as familiar with. Discuss your thoughts with classmates and then review some of the suggested answers provided in the WAV downloadable files.

Suggested answers may include these concepts:

Note: Risk, Procurement and the Quality Knowledge Areas are interrelated with this scenario.

Tailoring – Risk related to vendor – tailor procedures to enhance monitoring and tracking, tailor quality procedures; include vendor management and supplier on team

Agile/adaptive – Collaboration with supplier and vendor management; use adaptive methodology for the supplier deliverables to reduce risk

Trends – External vendor, perhaps discuss with vendor management to explore online or other tools to tracking and monitoring real-time; also discuss ways to build into contract shared risk, incentives

Interpersonal Techniques – Negotiation, influencing

PROJECT MANAGEMENT CONSIDERATIONS - CHAPTER 13 STAKEHOLDER

Consider the concepts of tailoring, agile, trends or interpersonal skills discussed in the *PMBOK® Guide*, Chapter 13. Review the following scenario and define how you would apply one or more of these concepts.

You have just been made aware of a new initiative starting for your manufacturing company. Because of your excellent track record, you have been assigned as the project manager and asked to collaborate with the business stakeholders to develop the business case and to assist with calculating the business benefits. You are delighted to find out that the business analysts with whom you have an excellent working relationship has also been assigned to this project.

Building on the scenario described in Chapter 4, Integration, you are considering the resources you will need for your manufacturing product project. As you continue to assemble your cross-functional team of top performers, ideally you would like your team to be co-located. However, that approach is not realistic since your team is spread world-wide.

How can you use the concepts above from this chapter to engage stakeholders throughout the project's life cycle?

There are many options, so challenge yourself to consider something you aren't as familiar with. Discuss your thoughts with classmates and then review some of the suggested answers provided in the WAV downloadable files.

Suggested answers may include these concepts:

Tailoring – Complexity of stakeholder relationships and communication technology

Agile/adaptive – Actively involve and plan stakeholder engagement for all stakeholders; co-creation, aggressive transparency

Trends – Identify all stakeholders, plan engagement activities for all stakeholders; use co-creation to be sure all stakeholders have been identified

Interpersonal Techniques – Negotiation, influencing, political awareness, leadership, conflict resolution, active listening

These Knowledge Area scenarios are related.

Scenario matrix

Manufacturing	Bio-tech	IT infrastructure
4 Integration	5 Scope	8 Quality
7 Cost	6 Schedule	11 Risk
9 Resource	10 Communications	12 Procurement
13 Stakeholder		