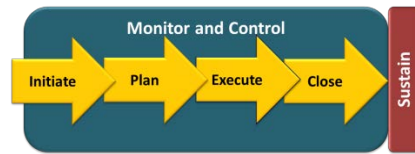


Project Management Pocket Guide



Project Management Is an Everyday Life Skill

This Pocket Guide has been designed for a wide range of users ranging from beginning project management students, to seasoned project management professionals.

We hope this Pocket Guide is useful to YOU!

Additional copies may be downloaded from www.pmforcte.com.

Legend: indicates essential topics for integration into CTE curriculum other than project management, such as marketing or engineering or agriculture

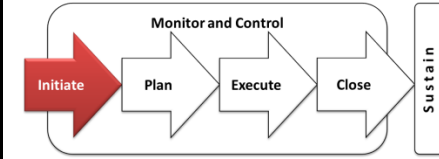
Your Project Checklist

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<input checked="" type="checkbox"/> Gain stakeholder support.	1
<input type="checkbox"/> Identify risks and limitations.	1
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Initiate Your Project



1.1

Study the project proposal.

Perform project assessment based upon available information and meetings with the sponsor, customer, and other subject matter experts, in order to evaluate the feasibility of new products or services within the given assumptions and/or constraints.

1.2

Define the scope.

Define the high-level scope of the project based on the business and compliance requirements, in order to meet the customer's project expectations.

1.3

Gain stakeholder support.

Perform key stakeholder analysis using brainstorming, interviewing, and other data-gathering techniques, in order to ensure expectation alignment and gain support for the project.

1.4

Identify risks and limitations.

Identify and document high-level risks, assumptions, and constraints based on current environment, historical data, and/or expert judgment, in order to identify project limitations and propose an implementation approach.

1.5

Develop the project charter.

Develop the project charter by further gathering and analyzing stakeholder requirements, in order to document project scope, milestones, and deliverables.

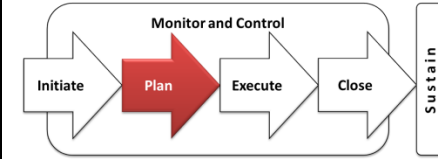
1.6

Obtain project charter approval.

Obtain approval for the project charter from the sponsor and customer (if required), in order to formalize the authority assigned to the project manager and gain commitment and acceptance for the project.

- Helpful to Know:
- Cost-benefit analysis
 - Business case development
 - Project selection criteria (for example, cost, feasibility, impact)
 - Stakeholder identification techniques
 - Risk identification techniques
 - Elements of a project charter

Plan Your Project



2.1

Establish the project deliverables with the stakeholders.

Assess detailed project requirements, constraints, and assumptions with stakeholders based on the project charter, lessons learned from previous projects, and the use of requirement-gathering techniques (e.g., planning sessions, brainstorming, focus groups), in order to establish the project deliverables.

2.2

Create the work breakdown structure.

Create the work breakdown structure with the team by deconstructing the scope, in order to manage the scope of the project.

2.3

Develop a budget plan.

Develop a budget plan based on the project scope using estimating techniques, in order to manage project cost.

2.4

Develop a project schedule.

Develop a project schedule based on the project timeline, scope, and resource plan, in order to manage timely completion of the project.

2.5

Develop an organization structure by defining team roles and responsibilities.

Develop a human resource management plan by defining the roles and responsibilities of the project team members in order to create an effective project organization structure and provide guidance regarding how resources will be utilized and managed.

2.6

Develop a communications plan.

Develop a communication plan based on the project organization structure and external stakeholder requirements, in order to manage the flow of project information.

2.7

Develop a resource procurement plan.

Develop a procurement plan based on the project scope and schedule, in order to ensure that the required project resources will be available.

2.8

Develop a plan to manage quality.

Develop a quality management plan based on the project scope and requirements, in order to prevent the occurrence of defects and reduce the cost of quality.

2.9

Define how changes will be handled.

Develop a change management plan by defining how changes will be handled, in order to track and manage changes.

2.10

Develop a risk management plan.

Develop a risk management plan by identifying, analyzing, and prioritizing project risks and defining risk response strategies, in order to manage uncertainty throughout the project life cycle.

2.11

Maintain project approval.

Present the project plan to the key stakeholders (if required), in order to obtain approval to execute the project.

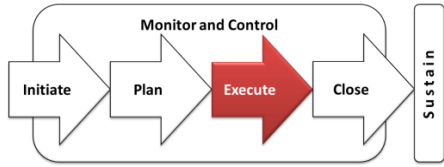
2.12

Conduct a kick-off meeting.

Conduct a kick-off meeting with all key stakeholders, in order to announce the start of the project, communicate the project milestones, and share other relevant information.

- Helpful to Know
- Requirements gathering techniques
 - Work breakdown structure (WBS) tools and techniques
 - Time, budget, and cost estimation techniques
 - Scope management techniques
 - Resource planning process
 - Workflow diagramming techniques
 - Types and uses of organization charts
 - Elements, purpose, and techniques of project planning
 - Elements, purpose, and techniques of communications planning
 - Elements, purpose, and techniques of procurement planning
 - Elements, purpose, and techniques of quality management planning
 - Elements, purpose, and techniques of change management planning
 - Elements, purpose, and techniques of risk management planning

Execute Your Project



3.1

Obtain and manage resources.

Obtain and manage project resources including outsourced deliverables by following the procurement plan, in order to ensure successful project execution.

3.2

Achieve the deliverables.

Execute the tasks as defined in the project plan, in order to achieve the project deliverables within budget and schedule.

3.3

Assure quality.

Implement the quality management plan using the appropriate tools and techniques, in order to ensure that work is being performed according to required quality standards.

3.4

Implement approved changes.

Implement approved changes according to the change management plan, in order to meet project requirements.

3.5

Minimize the impact of risks.

Implement approved actions (e.g. workarounds) by following the risk management plan, in order to minimize the impact of the risks on the project.

3.6

Maximize team performance.

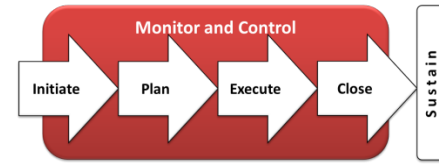
Maximize team performance through leading, mentoring, training, and motivating team members.

Helpful to Know

- Project monitoring tools and techniques
- Elements of a statement of work

- Interaction of work breakdown structure elements within the project schedule
- Project budgeting tools and techniques
- Quality standard tools
- Continuous improvement processes

Monitor and Control Your Project



4.1

Measure and communicate project performance.

Measure project performance using appropriate tools and techniques, in order to identify and quantify any variances, perform approved corrective actions, and communicate with relevant stakeholders.

4.2

Manage changes and update the plan.

Manage changes to the project scope, schedule, and costs by updating the project plan and communicating approved changes to the team, in order to ensure that revised project goals are met.

4.3

Ensure deliverables meet quality standards.

Ensure that project deliverables conform to the quality standards established in the quality management plan by using appropriate tools and techniques (e.g. testing, inspection, control charts), in order to satisfy customer requirements.

4.4

Manage the impact of risks.

Update the risk register and risk response plan by identifying any new risks, assessing old risks, and determining and implementing appropriate response strategies, in order to manage the impact of risks on the project.

4.5

Minimize the impact of changes.

Assess corrective actions on the issue register and determine next steps for unresolved issues by using appropriate tools and techniques in order to minimize the impact on project schedule, cost, and resources.

4.6

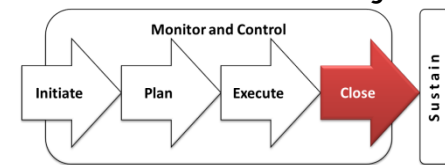
Communicate project status with stakeholders for feedback.

Communicate project status to stakeholders for their feedback, in order to ensure the project aligns with business needs.

Helpful to Know

- Performance measurement and tracking techniques (for example, EV, CPM, PERT)
- Project control limits (for example, thresholds, tolerance)
- Project performance metrics (for example, efforts, costs, milestones)
- Cost analysis techniques
- Variance and trend analysis techniques
- Project plan management techniques
- Change management techniques
- Integrated change control processes
- Risk identification and analysis techniques
- Risk response techniques (for example, transference, mitigation, insurance, and acceptance)
- Problem solving techniques (including root cause analysis)
- Reporting procedures

Close Your Project



5.1

Confirm that scope and deliverables were met.

Obtain final acceptance of the project deliverables by working with the sponsor and/or customer, in order to confirm that project scope and deliverables were met.

5.2

Transfer ownership as appropriate.

Transfer the ownership of deliverables to the assigned stakeholders in accordance with the project plan, in order to facilitate project closure.

5.3

Obtain financial, legal and administrative closure.

Obtain financial, legal, and administrative closure using generally accepted practices, in order to communicate formal project closure and ensure no further liability.

5.4

Distribute the final project report.

Distribute the final project report including all project closure-related information, project variances, and any issues, in order to provide the final project status to all stakeholders.

5.5

Conduct project review for learning and continuous improvement.

Collate lessons learned through comprehensive project review, in order to create and/or update the organization's knowledge base.

5.6

Archive documents and materials.

Archive project documents and material in order to retain organizational knowledge, comply with statutory requirements, and ensure availability of data for potential use in future projects and internal/external audits.

5.7

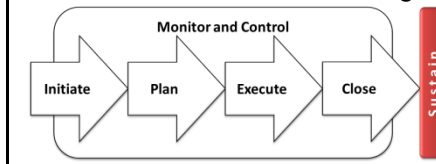
Measure customer satisfaction.

Measure customer satisfaction at the end of the project by capturing customer feedback, in order to assist in project evaluation and enhance customer relationships.

Helpful to Know

- Contract closure requirements
- Basic project accounting principles
- Close-out procedures
- Feedback techniques
- Project review techniques
- Archiving techniques and statutes
- Compliance (statute/organization)
- Transition planning techniques

Sustain Your Project



Sustainability Questions

- How will the project integrate into the future of the organization and/or stakeholders?
- Will the impact of the project create new projects or concerns that need to be addressed?
- Will the project need to be reviewed again in a month, a year, five years?
- Are there future costs that need to be accounted for?
- Are on-going quality concerns flagged appropriately?
- Has someone been identified to address sustainability issues?
- Are future communications with stakeholders identified and planned?
- Are potential future risks or limitations identified and responsibility delegated?
- Will the acquisition of any resources be needed in the future?

Overall Knowledge and Skills

- Active listening
- Brainstorming techniques
- Conflict resolution techniques
- Cultural sensitivity and diversity
- Data gathering techniques
- Decision making techniques
- Facilitation
- Information management tools, techniques, and methods
- Leadership tools and techniques
- Negotiating
- Oral and written communication techniques, channels, and applications
- PMI's Code of Ethics and Professional Conduct
- Presentation tools and techniques
- Prioritization/time management
- Problem-solving tools and techniques
- Project management software

- Relationship management
- Stakeholder impact analysis
- Targeting communications to intended audiences (for example, team, stakeholders, customers)
- Team motivation methods

Legend: indicates essential topics for integration into CTE curriculum other than project management, such as marketing or engineering or agriculture

References

A Guide to the Project Management Body of Knowledge (PMBOK® Guide) Fourth Edition. © 2008 Project Management Institute.

Project Management Professional (PMP®) Examination Content Outline. © 2010 Project Management Institute.

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Project Management for Career and Technical Education

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