A Tiered Approach to Implement the *PMBOK® Guide*

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Agenda

1. What is Virtual Lunch & Learn
2. Your Expectations from this Webinar
3. Introduction – Myself
4. A Tiered Approach to Implement the *Guide to the Project Management Body of Knowledge (PMBOK® Guide)*
   a. **About the Tiered Approach**
   b. **Small Tier/Fast Track Projects**
   c. **Medium Tier/Medium to High Complexity**
   d. **Large Tier/High Complexity**
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   f. **Conclusion**
5. Upcoming Learning Opportunities from RefineM
6. How to get 1 PDU for this Webinar?
7. Rewarding Our Loyal Attendees
8. Q & A

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RefineM's Virtual Lunch & Learn

This is a monthly webinar delivered during the lunch hour in the first week (Wednesdays) of every month.

It's designed to help you learn while you eat lunch, providing a relaxed environment to enhance your experience.

The monthly webinars will cover a variety of Project Management / Agile topics.

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Your Expectations

What are your expectations from this webinar?

Why are you here today?

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Helping organizations turn their project management capability into a *competitive advantage*

My professional journey b/f RefineM

* CEO/Consultant since Dec 2011
  * Agile Coaching/Adoption
  * Project Management/ Process Improvement Consulting and Training
  * Project Management Toolkits (for PMs, Executives and Agile Practitioners)

* 20+ years of Successful Project Leadership
  * Led 100s of projects of all sizes, successfully
  * Recovered many projects, saved millions of $
  * Implemented numerous process improvements
  * Coached/mentored 100s of PMs, and some executives
  * Former Board Member – SWMO PMI Chapter (2008-2014)

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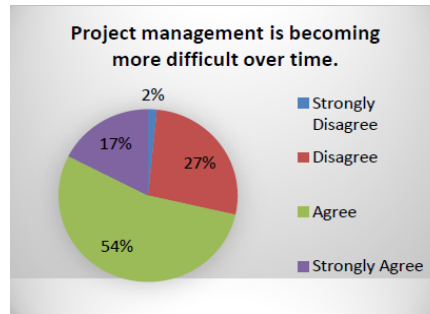# A Tiered Approach to Implement the *PMBOK® Guide*

- About the Tiered Approach
- Small Tier/Fast Track Projects
- Medium Tier/Medium to High Complexity
- Large Tier/High Complexity
- Change, Procurement, and Vendor Management
- Conclusion

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About the Tiered Approach

* In our _survey of project managers_, nearly 70 percent feel project management is becoming more difficult

Project management is becoming more difficult over time.

- 2% — Strongly Disagree
- 27% — Disagree
- 54% — Agree
- 17% — Strongly Agree

* Not every project needs the full _PMBOK® Guide_
  ✓ How to determine how much rigor is needed on a project?

Where is the sweet spot?

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About the _PMBOK® Guide_

* First released in 1996 to record the standards and best practices in project management

* 2nd edition: 2000

* 3rd edition: 2004
  ✓ Added practices "generally recognized as good practice most of the time"

* 4th edition: 2009
  ✓ 42 processes, 9 Knowledge areas

* 5th edition: 2013
  ✓ Added stakeholder management
  ✓ 47 processes, 10 knowledge areas

* 6th edition: ????

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Source: Chung, Edward (2014, 13 November). A short history of the PMBOK Guide Published by PMI.
Edward Designer. Web. _http://edward-designer.com/web/short-history-pmbok-guide-pmi/_   www.RefineM.com

PMBOK® Guide Fifth Edition

* Released in 2013
* 47 processes, 10 knowledge areas
* Added stakeholder management as a knowledge area
  * ✓ Was in communications management
* Changed communications management
  * ✓ Removed stakeholder management processes from communications
* Added new planning processes for each knowledge area
  * ✓ i.e. Plan Scope Management, Plan Communications Management
* Changed and clarified many existing processes

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Challenges of Implementing PMBOK® Guide

* There are a lot of processes
  * ✓ 47 processes across 10 knowledge areas
* For each process, an organization needs to:
  * ✓ Learn how to implement the process
  * ✓ Learn best practices and pitfalls from experience
  * ✓ Refine and tailor the process
* Project managers have less time and fewer resources available to deploy the full PMBOK® Guide
* They may not need every process on every project
  * ✓ But which ones can you miss without causing problems?

Where is the "sweet spot"?

A tiered approach can provide the answer

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About the Tiered Approach

✽ Small Tier: For "Fast Track" projects
   ✓ 1-2 full-time people on 1-2 smaller projects

✽ Medium Tier: For medium complexity projects
   ✓ 4-8 full-time people on 2-6 medium-sized projects

✽ Large Tier: For large, high complexity projects
   ✓ 10 or more full-time people on 6 or more large projects

Which tier is right for you?
What size / duration of projects do you have?

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Project Fitness

Tier / Complexity	# of Projects	Team Members (FTE)	Duration	Effort (Person months)	Recommended Processes
Small	1-2	1-2	2-10 wks.	Up to 50	4
Medium	2-6	4-8	4-12 mons.	Up to 200	8
Large	Over 6	Over 10	> 12 mons.	Over 600	17

Which tier is right for you?
What size / duration of projects do you have?

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Small Tier

* For "Fast Track" projects
  - ✓ 1-2 full-time people
  - ✓ 1-2 smaller projects
  - ✓ Duration may be measured in weeks rather than months
  - ✓ Total Effort may be up to 50 person-months/year

Small Tier Processes

* Four Small Tier Processes
  - ✓ Project Charter
  - ✓ Stakeholder Analysis
  - ✓ Project Schedule
  - ✓ Communication Plan

Why These Small Tier Processes?

* Every project needs these four processes
  - ✓ Project charter provides a project with authority
    - ▪ Charter can include high-level scope, budget, risks
  - ✓ Project managers need to know who stakeholders are
  - ✓ Stakeholders will expect a schedule
  - ✓ Communication plan is needed to manage stakeholder communications and keep them satisfied

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Medium Tier

* For medium size/complexity projects
* Or more smaller projects in a portfolio/program
  - ✓ 2-6 medium-sized projects
  - ✓ 4-12 months duration
  - ✓ 4-8 full-time team members
  - ✓ Total length up to 200 person-months/year

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Medium Tier Processes

* Eight Medium Tier Processes
  - ✓ Project Charter
  - ✓ Stakeholder Analysis
  - ✓ Work Breakdown Structure
  - ✓ Resource Allocation
  - ✓ Project Schedule
  - ✓ Communication Plan
  - ✓ Risk Register
  - ✓ Performance Reporting

Same as Eight Powerful PM Processes

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Why These Medium Tier Processes?

* Extra processes help with increasing complexity
  - ✓ WBS: keeps everyone on same page with scope
  - ✓ Resource Allocation: Helps manage people working on multiple projects
  - ✓ Risk Register: More complexity, greater risk
  - ✓ Performance Reporting: More stakeholders means more reporting requirements

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Large Tier

* For larger size/complexity projects or more projects
  - ✓ Over 6 large or complex projects
  - ✓ Over 10 months duration
  - ✓ 10 or more full-time team members
  - ✓ Total length likely closer to 600 person-months or greater

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Large Tier Additional Processes

* 8 Processes of Medium Tier + following 9 more:
  - ✓ Scope Statement
  - ✓ Requirements Traceability Matrix
  - ✓ Project Estimation
  - ✓ Project Cost
  - ✓ Quality Metrics
  - ✓ Risk Quantitative Analysis
  - ✓ Earned Value Management / Variance Analysis
  - ✓ Change Management
  - ✓ Lessons Learned

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Why These Large Tier Processes?

* Scope Statement: Minimizes rework due to misinterpretations of scope
* Requirements Traceability Matrix: Links requirements and team so you know who is doing the work
* Project Estimation: Solidifies project estimates
* Project Cost: Provides monitoring of money spent
* EVM / Variance Analysis: Provides better project status and ability to forecast future results

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Why These Large Tier Processes? (cont.)

* Quality Metrics: Minimizes defects
* Risk Quantitative Analysis: Provides more rigor on risks
* Lessons Learned: Capture for process refinements
* Change Management: Necessary for large, complex projects or projects where scope changes could be lot more.

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Procurement and Vendor Management

* Procurement management needed if many contracts are being used

* Vendor management needed if several vendor relationships are in place

* You may need these processes at any tier if you use vendors or buy resources/material for your project

* Important to develop these processes
   - ✓ Even if they're not used all the time
   - ✓ That way you are ready when they are needed

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Processes By Tier

Process	Small	Medium	Large
Project Charter	✓	✓	✓
Stakeholder Analysis	✓	✓	✓
Project Schedule	✓	✓	✓
Communication Plan	✓	✓	✓
Work Breakdown Structure	×	✓	✓
Resource Allocation	×	✓	✓
Risk Register	×	✓	✓
Performance Reporting	×	✓	✓
Scope Statement	×	×	✓
Requirements Traceability Matrix	×	×	✓
Project Estimation	×	×	✓
Project Cost	×	×	✓
Quality Metrics	×	×	✓
Risk Quantitative Analysis	×	×	✓
Earned Value Management	×	×	✓
Change Management	×	×	✓
Lessons Learned	×	×	✓

Which tier is right for you?

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Conclusion

∗ Too few processes: uncertainty increases
∗ Too many processes: value of project management decreases due to overwork
∗ Each organization may need additional refinements

Find your organization's project management "sweet spot" today

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Training Title	Springfield, Missouri	Atlanta, Georgia
PMP® Exam Prep	June 22-25	
Cost Management for Projects		June 30
Authentic Leadership: Using the Power of Inspiration to Lead Teams	August 24	
Do More With Less: Deliver Projects Successfully With Only 8 PM Processes		August 27
Role of a Product Owner in Driving Agile Projects (1/2 day)		August 28
PMP® Exam Prep	September 1-3	

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Training Title	Instructor-Led Online	Free Webinar
PMP® Exam Changes		July 1
Scaling Agile		August 5
Ace Your PMP® Exam: Final Review	September 10	

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July 2015 Lunch and Learn

* *PMP® Exam Changes*
  * ✓ How is the Project Management Professional (PMP)® Exam changing?
  * ✓ What do you need to know to succeed?
  * ✓ Should you schedule your exam before or after changes?
* *Wednesday, July 1, 12:00-1:00 PM Central*

Register Today - Don't wait for the last Minute

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How to Claim 1 PDU for this Webinar?

* PDU Category – B, Continuing Education
* Program Title – Webinar on "A Tiered Approach to Implement the *PMBOK® Guide*"
* Date Started – Today's date
* Date Completed – Today's date
* Hours Completed – 1.00
* Provider
  * ✓ Name – RefineM
  * ✓ Phone # 417-414-9886
  * ✓ Email – nks@refinem.com
* PDUs Claimed – 1.00

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  - ✓ $10 Amazon Gift Card

Congratulations to the winners!
Stay tuned for our next drawing in July.

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Questions?

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