SkillsBuild Aprendiendo

Fundamentos de la gestión de proyectos

Introducción

5 Minutos

¡Vivimos en un mundo de proyectos!

El **Taj Mahal (https://mymodernmet.com/taj-mahal-facts/)** es uno de los monumentos más reconocibles del mundo. Alrededor de 22.000 trabajadores trabajaron en él con miles de pintores, artistas del bordado y canteros para ejecutar el intrincado trabajo. Esta atención al detalle y la planificación del proyecto dieron sus frutos, ya que la tumba tardó unos 12 años en terminarse. Luego, el resto de los edificios del complejo se completarían después de 10 años adicionales.

La **Estación Espacial Internacional (https://www.space.com/16748-international-space-station.html)** da la vuelta al mundo aproximadamente una vez cada 90 minutos a una velocidad de aproximadamente 17,500 millas por hora (28,000 kilómetros por hora). La Estación fue un proyecto de construcción desarrollado por una asociación de 15 países. Es la estructura individual más grande que los humanos hayan puesto en el espacio.

Las vacunas ayudarán a prevenir la propagación de COVID-19 para poner fin a la pandemia. La mayoría de las vacunas tardan años en desarrollarse, pero los científicos crearon **múltiples vacunas para COVID-19 (https://www.nature.com/articles/d41586-020-03626-1)** en un año debido a la financiación, los recursos suficientes, las investigaciones anteriores y un proceso regulado de desarrollo de vacunas.

Estos son solo algunos **grandes** proyectos que fueron un éxito para la comunidad mundial.

¡Probablemente puedas pensar en algunos proyectos que hayas emprendido en tu vida, ya sean grandes o pequeños, que hayan tenido éxito!

Acerca de este curso

¡Bienvenido al curso **de Fundamentos de Gestión de Proyectos**!

Piense en la gestión de proyectos como el arte y la ciencia de hacer que las cosas sucedan. Los gerentes de proyecto tienen un plan y lideran a un equipo en un viaje, a través de pruebas, algunos comentarios y triunfos para realizar una visión. Los gerentes de proyectos son responsables de una amplia gama de procesos y relaciones.

Esta es una experiencia de aprendizaje introductoria diseñada para brindarle conocimientos fundamentales sobre los conceptos de gestión de proyectos. Este curso le presenta los principios básicos de la gestión de proyectos y lo que se necesita para ser un gerente de proyectos exitoso. ¡Quizás se interese en buscar oportunidades de aprendizaje adicionales para este puesto de trabajo en demanda!

Resultados del aprendizaje

Al final de este curso, podrás:

- Definir términos comunes de gestión de proyectos
- Reconocer el valor de la gestión de proyectos
- Differentiate between project management approaches: Waterfall, Agile, and Hybrid
- Describe the role, overall responsibilities, and competencies of a project manager
- Identify the purpose of the phases of a project: Initiate and Plan, Execute, and Close
- Describe the key tasks that a project manager performs in each project phase
- Explain the overall job market and common industry certifications to consider in the project management field

And, most importantly, you'll put on your project manager "hat" to respond to some interactive situations based on a project scenario.

Estimated duration

- 3 hours, 30 minutes

Completion criteria

To receive credit for this learning experience, you need to visit all the pages in the course, complete the interactive activities and quizzes, and pass the final assessment.

The concepts in the courses build on one another, so you should take the lessons in order.

 As you progress through the course, you'll see completion check marks beside the topic names in the side navigation.

Badging opportunity

Complete this course to earn the **Project Management Fundamentals** badge!

Please allow a few business days for processing. You will receive an email to claim the badge online.

IBM SkillsBuild gratefully acknowledges the contributions and collaboration of the International Project Management Association (IPMA) and the IBM Project Management Center of Excellence in the development of this course.

IPMA (https://www.ipma.world/)

IBM (https://www.ibm.com)

¿Listo para comenzar tu viaje?

En primer lugar, aprenderá qué es un proyecto y el papel de un gerente de proyecto.

*Para continuar, seleccione **¡Lo he comprobado!** para obtener sus minutos de aprendizaje y, a continuación, seleccione **Siguiente**.*

Empezar / ¿Qué es un proyecto?

5 Minutos

Hay muchas definiciones sobre lo que es un **proyecto**. Los proyectos pueden variar desde esfuerzos simples hasta empresas grandes y complejas que requieren mucho tiempo, esfuerzo y dinero. Aquí hay tres definiciones de un proyecto de organizaciones reconocidas para que pueda estar familiarizado con un proyecto.

¿Puedes detectar términos y temas comunes para poder definir un proyecto?

Un proyecto es un esfuerzo único, temporal, multidisciplinario y organizado para realizar los entregables acordados y crear valor dentro de requisitos y restricciones predefinidos, incluidas múltiples restricciones como tiempo, costo, recursos y estándares o requisitos de calidad. Para que un proyecto tenga éxito, la apreciación de los resultados del proyecto debe provenir de las diversas partes interesadas. **1**

Un proyecto es un proceso único, que consiste en un conjunto de actividades coordinadas y controladas con fechas de inicio y finalización, emprendidas para lograr un objetivo que se ajuste a requisitos específicos, incluidas las limitaciones de tiempo, costo y recursos. **número arábigo**

Un proyecto es un esfuerzo temporal realizado para producir un producto, servicio o resultado único.

- Un proyecto es **temporal** en el sentido de que tiene un principio y un final definidos en el tiempo y, por lo tanto, un alcance y recursos definidos.
- Y un proyecto es **único** en el sentido de que no es una operación de rutina, sino un conjunto específico de operaciones diseñadas para lograr un objetivo singular. Por lo tanto, un equipo de proyecto a menudo incluye personas que generalmente no trabajan juntas, a veces de diferentes organizaciones y en múltiples geografías. **3**

¿Dónde puedes encontrar proyectos?

Tanto en el sector privado como en el público, las organizaciones establecen y gestionan proyectos. Puede encontrar proyectos en áreas como tecnología de la información (TI), desarrollo organizacional, desarrollo de productos, marketing, investigación, eventos y áreas políticas, educativas y sociales. **1**

El desarrollo de software para mejorar el proceso de negocio, la construcción de un edificio o puente, el esfuerzo de socorro después de un desastre natural y la expansión de las ventas a un nuevo mercado geográfico, todos son proyectos. **3**

Fuentes:

1 Asociación Internacional de Gestión de Proyectos (IPMA) (https://www.ipma.world/)

2 Organización Internacional de Normalización (ISO) 10006 (https://en.wikipedia.org/wiki/ISO_10006)

3 Instituto de Gestión de Proyectos (PMI) (https://www.pmi.org/about/learn-about-pmi/what-is-project-management)

> To summarize, a project:
>
> - Is temporary with an identifiable beginning and end
> - Is unique and organized
> - Has constraints, such as time, cost, and resources
> - Accomplishes the objective to produce a product, service, or agreed deliverable that has value for the end user

Also, what is a portfolio and a program?

When learning about projects, it's helpful to understand that projects have a relationship to portfolios and programs.

Expand and compare the following definitions of a portfolio and program.

Portfolio

A **portfolio** is a **collection** of projects, programs, subsidiary portfolios, and operations managed as a group to achieve strategic objectives. The programs or projects of the portfolio may not necessarily be interdependent or directly related.

Program

A **program** is a **group of related** projects, subsidiary programs, and program activities that are managed in a coordinated manner to obtain benefits not available from managing them individually. A program has a scope that encompasses the scope of its program components.

Source: PMI, A Guide to the Project Management Body of Knowledge (PMBOK® Guide) – Sixth Edition (2017) (https://www.pmi.org/pmbok-guide-standards/foundational/pmbok).

Get started / What is project management?

3 Minutos

Project management is accomplished by applying proven methodologies and techniques with the goal of ensuring the consistent delivery of high-quality services, solutions, or deliverables that meet or exceed client requirements and expectations.

Project management is:

- The planning, executing, and monitoring of project activities to meet project objectives
- Achieved by effectively controlling and balancing the constraints of time, cost, and scope
- Performed through processes and across multiple phases in what is called the project's "lifecycle"

Large organizations develop **custom** project management methodologies and tools to manage different types of projects consistently and repeatedly.

What is the value of project management?

Effective project management adds value to organizations in many ways. It can:

- Provide focus and control for the greater likelihood of achieving project goals
- Result in delivering quality results consistently
- Potentially reduce costs and risks
- Manage changes and conflicts
- Ensure the efficient use of resources

Project management is a specialization and profession that includes best practices, tools, methods, and certification schemes that can be applied as standards that are also reusable.

Overall, a strong, organization-wide commitment to project management leads to long-term business value and even a competitive advantage.

CHECK THIS OUT!

To learn more, read this article, **Why Is Project Management So Important To An Organization? (https://thedigitalprojectmanager.com/why-is-project-management-important/)**, The Digital Project Manager, by Ben Aston, January 2021.

Do projects fail?

Yes, they do! It's valuable for you to know that the typical reasons that projects fail are because they are **over budget**, **run over schedule**, or **do not deliver the required quality**.

The causes of why projects fail can be a range of issues, including basic ones such as a lack of understanding of the project goals or strategic alignment. Other common issues are:

- Lack of stakeholder involvement
- Lack of leadership
- Poor team organization
- Insufficient competencies of the people involved in the implementation of the project
- Poor processes

For this reason, it's important to promote good practices and follow a project management approach to ensure project success.

Get started / Approaches to project management

10 Minutos

There are many approaches to project management. Choosing a project management approach can depend on the organization's standards, the type of project, or the team make-up. It's an important decision because it impacts how the team works together. Different project management methodologies have their own pros and cons for different project types. Some approaches are traditional or sequential, while others are more flexible.

Let's explore three widely used approaches: **Waterfall**, **Agile**, and **Hybrid**.

Waterfall

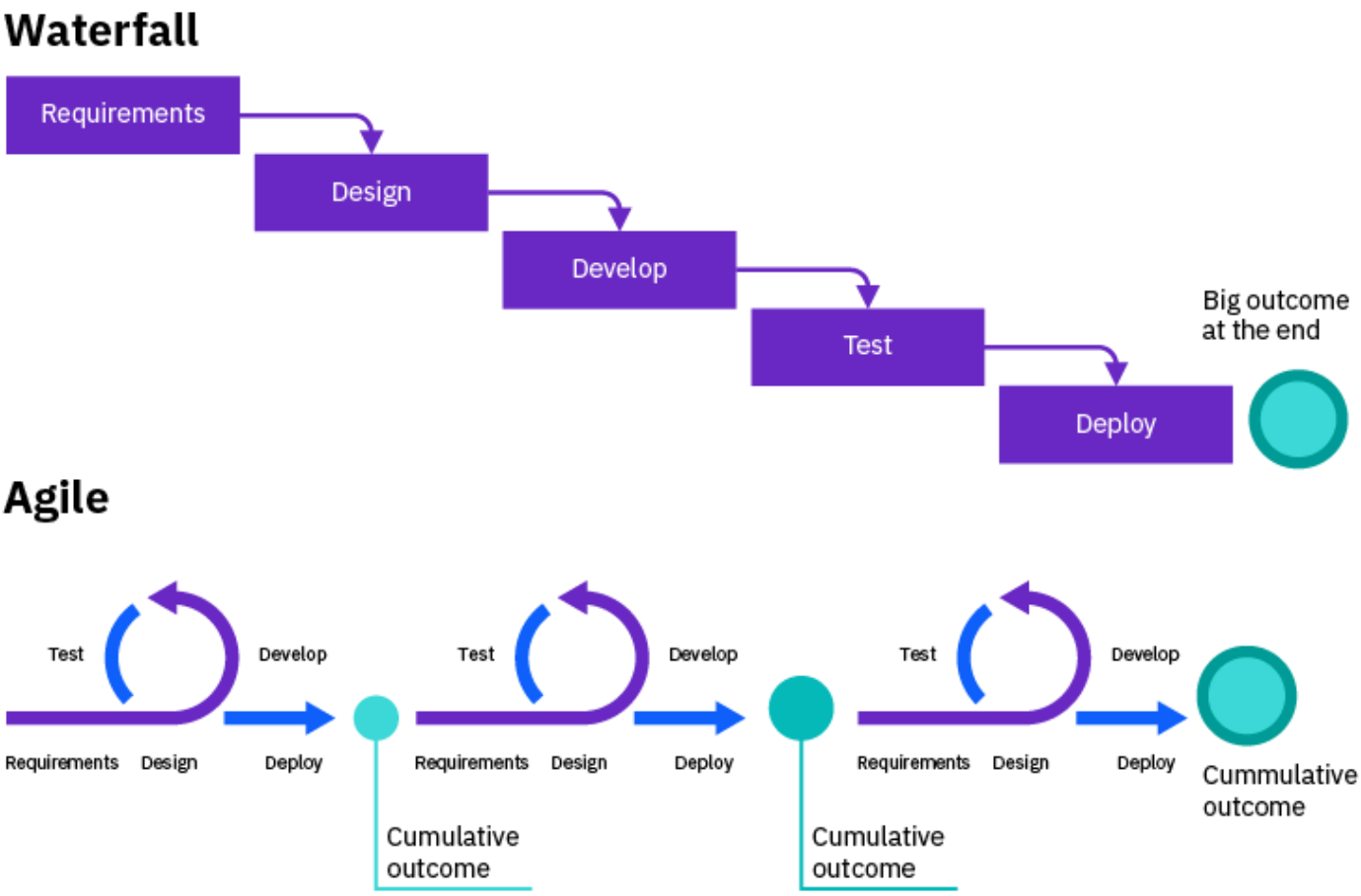
- Perhaps the most common type, the Waterfall model is a traditional and sequential approach.

- There are usually several project phases that follow in a linear order.
- Teams complete one task before the next task begins in a connected sequence that adds up to the final deliverable.
- They collect and analyze requirements from the client, design the solution, implement the solution, and fix any issues.
- This approach is easy to implement, and every task is planned out; however, the team must begin with a clear scope of work because changes can be challenging and disrupt the series of tasks.

Agile

- Essentially, an Agile approach is the opposite of a Waterfall approach to a project.
- Agile is a very flexible approach in which teams break up their work into smaller chunks and they work iteratively to deliver an outcome incrementally.
- Work phases are short in duration and are typically called “sprints” or “iterations.”
- One of the main benefits of this approach is it allows the team to respond to new requirements or changes more easily.

Here is a graphical representation of the project phases so you can visualize Waterfall versus Agile projects:



Waterfall versus Agile: How are they different?

Waterfall

1. Has a fixed, linear plan in which the scope and deliverable are known.
2. Tasks are mapped out at the start of the project.
3. There is a final deliverable at the end of the project.
4. Client feedback is considered at the start with requirements and at the conclusion of the project.

Agile

1. Has an iterative and flexible process that could evolve into a different deliverable than was originally envisioned.
2. New priorities and requirements are considered in each sprint.
3. There are incremental deliverables throughout the project and a cumulative deliverable.
4. Client feedback is a focus and considered in each sprint or iteration.

Hybrid

- As the name implies, a Hybrid approach is a combination of the Waterfall and Agile approaches to get “the best of both worlds” to provide a flexible yet structured approach.
- Some common examples of using a Hybrid approach are:

1. Using Agile when there is uncertainty, complexity, and risk in the development phase of the project, such as for a new IT solution, and then using a traditional approach in the rollout phase
2. Using a combination of Agile and traditional approaches throughout the project, such as upfront planning and estimation and work assignment, together with short iterations and daily meetings
3. Using an Agile approach for a small element with uncertainty, complexity, or opportunity for scope creep within a mostly traditional project approach, such as when part of the product is produced using new materials that haven’t been used or tested before
4. Using an Agile approach with a component produced in a traditional way, such as when the production of the component is externalized, and the external provider uses the traditional approach to produce it

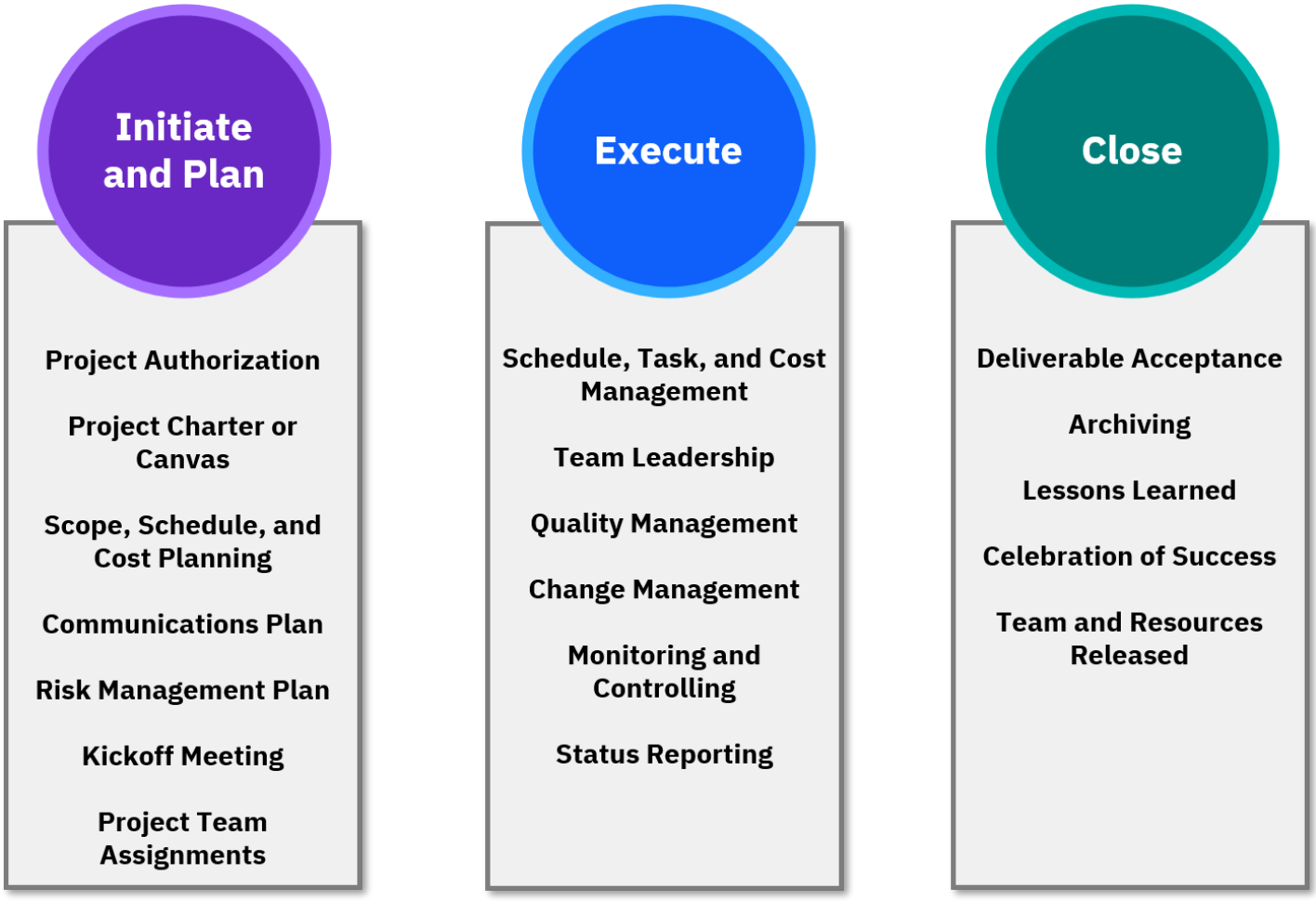
   Source: PMI Agile Practice Guide (2017) (https://www.pmi.org/pmbok-guide-standards/practice-guides/agile).

Key points

In a traditional project management approach, the names and number of project management phases will vary. The five traditional phases you'll commonly see are:

1. Initiate
2. Plan
3. Execute
4. Monitor and Control
5. Close

In this course, the focus is on a combination of these three traditional phases of project management: **Initiate and Plan**, **Execute**, and **Close**. This will give you the foundational base you need and you can build on this knowledge in future courses. Here is a diagram that illustrates the three project phases and the key activities the course covers:



Project management processes are not necessarily linear or sequential. Some activities are ongoing and reoccur throughout the project lifecycle, while others are recommended for specific points in time during the project lifecycle.

Example

The ongoing need for replanning in a project occurs **multiple times** at unplanned intervals during the lifecycle, while project closure activities occur **one time** at the end of a project.

CHECK THIS OUT!

There are many more project management approaches and frameworks that organizations use. You might hear about them or want to explore them on your own. These include **Scrum (https://www.scrum.org/)**, **PRiSM (Projects integration Sustainable Methods) (https://www.greenprojectmanagement.org/prism-methodology)**, and **PRINCE2 (Projects IN Controlled Environments) (https://www.prince2.com/uk/what-is-prince2)**, among others.

Get started / The project manager

10 Minutos

The **project manager (PM)** leads a project team to deliver a solution or deliverable to the client according to the project charter, agreement, or contract, and uses the appropriate project management processes and tools.

PMs have the overall responsibility of managing the project's scope, cost, and schedule as well as the quality of the deliverables, which includes applying techniques for planning, tracking, change control, and risk management.

They provide day-to-day direction to the project team and report project status to the client.

Overall, PMs are accountable for the success of a project. This includes meeting deadlines, maintaining quality standards, and staying within budget.

Expand the following section to learn more about PM responsibilities.

PM responsibilities

Here is a summary of typical PM responsibilities:

•

Oversee all aspects of a project

- Understand the project's requirements, goal, and scope
- Set deadlines, assign responsibilities, and monitor and report on progress
- Ensure projects are delivered on time, within scope, and within budget
- Develop a project plan and maintain comprehensive project documentation, such as a communications plan and risk management plan
- Manage changes to the project scope, schedule, and costs using appropriate tools and techniques
- Measure project performance using appropriate tools and techniques
- Manage the relationship with the client and all stakeholders
- Lead the team and coordinate with other teams
- Perform risk management to minimize project risks
- Track project performance

> Project managers understand project requirements, determine strategies for projects, bring needed professionals with the right competencies on board, and monitor the progress of the work.

IPMA competencies

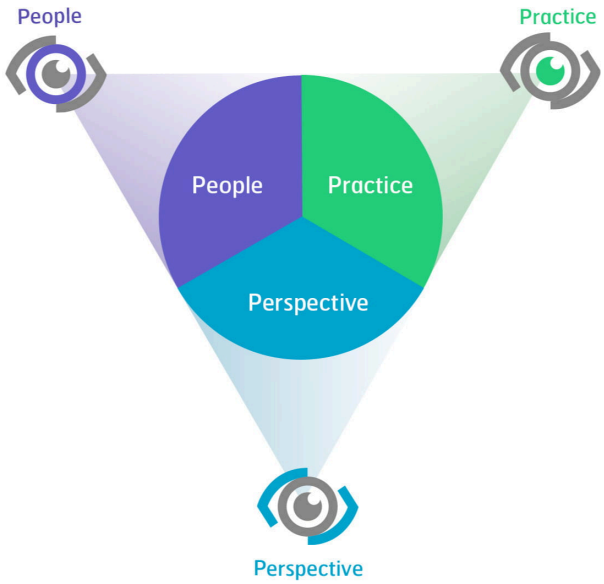
The **International Project Management Association (IPMA) (https://www.ipma.world/)** supports the development of individual competencies for project, program, and portfolio management by providing a comprehensive list of competencies in three different domains within its global standard, **Individual Competence Baseline (ICB) (https://www.ipma.world/individuals/standard/)**.

Competence is defined as the application of the following:

- **Knowledge** is the collection of information and experience that an individual possesses, such as understanding the concept of a project schedule.
- **Skills** are specific technical capabilities that enable an individual to perform a task, such as being able to build a project schedule.
- **Ability** is the effective delivery of knowledge and skills in a given context, such as being able to lead and successfully manage.

The **Eye of Competence** can help you understand the **competencies** that a balanced individual needs to **have** or **develop** to successfully manage a project. There are **29 competence elements**, which are divided into **three domains**:

- People
- Practice
-



Perspective

The **Perspective** domain includes the methods, tools, and techniques through which PMs interact with the environment, as well as the rationale that leads people, organizations, and societies to start and support projects. There are 5 competencies associated with the context of a project.

People

The **People** domain includes the personal and interpersonal competencies required to successfully participate in or lead a project. There are 10 competencies associated with the personal and social context of an individual.

Practice

The **Practice** domain includes the specific methods, tools, and techniques used in projects to realize their success. There are 14 competencies associated with the technical part of the project.

The full list of competencies is shown here.

Take a moment to review the competencies across the Perspective, People, and Practice domains.

PERSPECTIVE

- Strategy
- Governance, structures and processes
- Compliance, standards and regulation
- Power and interest
- Culture and value

PEOPLE

- Self-reflection and self-management
- Personal integrity and reliability
- Personal communication
- Relations and engagement
- Leadership
- Teamwork
- Conflict and crisis
- Resourcefulness
- Negotiation
- Results orientation

- Design
- Requirements and objectives
- Scope
- Time
- Organization and information
- Quality
- Finance
- Resources
- Procurement
- Plan and control
- Risk and opportunity
- Stakeholders
- Change and transformation
- Select and balance

All project management competencies, independent of the domain they belong to, are **equally important**.

However, emphasis on a particular domain may vary depending on the hierarchical level on which the individuals are and change as individuals are progressing and moving from one level to the next during their careers.

Source: M. Vukomanović, Building the Global Project Profession presentation at the IPMA SIG Smarter U conference for Project Management at Universities: From local to global, 2021

In this figure, you can see:

- At the operational management level, the focus is on the technical or **Practice competencies**
- At the middle management level, the focus is on the behavioral or **People competencies**
- At the top management level, the focus is on the context or **Perspective competencies**

In addition, during the project implementation, different competencies are needed and demonstrated **across each project phase**. Let's look at some examples of this.

Expand the sections to review the competencies that PMs should demonstrate across project phases.

Perspective competencies

A PM should demonstrate various **Perspective competencies** at the start of the project, so the project is aligned well with the organization and stakeholders are identified. These competencies include strategy; governance, structure and processes; compliance, standards and regulation; power and interest; and culture and values.

People competencies

A PM should demonstrate many of the **People competencies** when executing a project. These competencies include personal integrity and reliability, personal communication, leadership, teamwork, and resourcefulness, just to name a few.

A PM should continue demonstrating **People competencies** like self-reflection and self-management, and results orientation at the close of a project when the focus is on meeting client expectations and learning from the project.

Practice competencies

A PM should demonstrate the **Practice competencies** when initiating, planning, and executing a project.

At the start of the project, needed competencies include requirements and objectives, scope, plan and control, stakeholders, and more.

When executing a project, a PM should demonstrate competencies like design, time, quality, finance, risk and opportunity, and change and transformation.

> **Note**: Although competencies from different domains are mentioned throughout the course, the focus is on the competencies from the **Practice** domain.

CHECK THIS OUT!

Visit the IPMA website to learn more about the Individual Competence Baseline for Project, Programme and Portfolio Management.

IPMA (https://www.ipma.world/individuals/standard/)

Get started / The stakeholders

2 Minutos

Stakeholders are those with an interest in the project's outcome.

A stakeholder is any individual or organization that is actively involved in the project or whose interests might be affected, either positively or negatively, as a result of project execution or successful project completion.

Stakeholders can be **internal** to the organization, such as the sponsor or client for the project, top management, and all of the project team members.

Stakeholders can also be **external** to the organization, such as an external customer and a contractor or supplier that provides services or a product needed by the project.

Important to know

- Identifying and communicating with the stakeholders is an important responsibility of the project manager.
- Most projects have a number of stakeholders, and they each have their own objectives for the project. The project manager must understand these stakeholders and their respective objectives. Using this information, the project manager must ensure that what is done on the project is consistent first with the project requirements and then with the stakeholders' objectives. Ideally,

the objectives of the different stakeholders are closely aligned. If not, a series of negotiations might be required to align the objectives.

- Stakeholders can make or break the success of a project. One of the reasons for project failure is that stakeholders lose their commitment to the project. It's important to keep stakeholders involved in the project.

Get started / Mini quiz

5 Minutos

Let's check your understanding of the concepts presented so far.

*Select **I've checked it out!** to begin.*

Get started / Project scenario background

3 Minutos

Throughout this course, you'll be presented with examples to help illustrate key concepts as you learn about project management activities. The examples are based on the following fictitious project scenario.

Take a moment to read about the project to get familiar with the goal, client, and project manager.

Project scenario

What's the project?

City Star Training Solutions (CSTS) is a corporate training provider that develops award-winning, tailor-made learning and development programs for organizations. CSTS has a contract for a new learning program about to kick off. A global mobile app and software development agency called

Wired Letters needs a new, custom one-hour digital course for its employees to understand the agency's new virtual teaming tools for collaborating at work.

What's the goal of the project?

- Wired Letters has experienced an increase in the number of employees who need or want to work from home.
- This workforce transformation reduces costs, but the agency needs to increase collaboration and productivity as employees work virtually.
- The goal of the project is for the new digital course to achieve 90% or greater employee adoption of the agency's new virtual teaming tools across all business units. Wired Letters has 1,320 employees.

What's the timing?

- Wired Letters wants the new course as soon as possible. Time is of the essence!
- CSTS has agreed on a time estimate of seven to nine weeks for the course development process.

Who's who?

- **Sam Green**, Learning Director of Wired Letters, is the client. Sam is excited and ready for this digital course to make a big impact.
- **Vivienne Chen** is the Program Manager at CSTS and is responsible for the overall contract execution.
- **Natasha Verma** is the assigned CSTS Project Manager from Vivienne's team. Natasha has over nine years of experience as a project manager in the learning profession. She is an excellent leader and very organized. Natasha must manage the team, scope, schedule, and keep team morale up! Let's see how she manages this project!

You'll see how this project progresses as you advance through the course!

Initiate and plan a project / Purpose

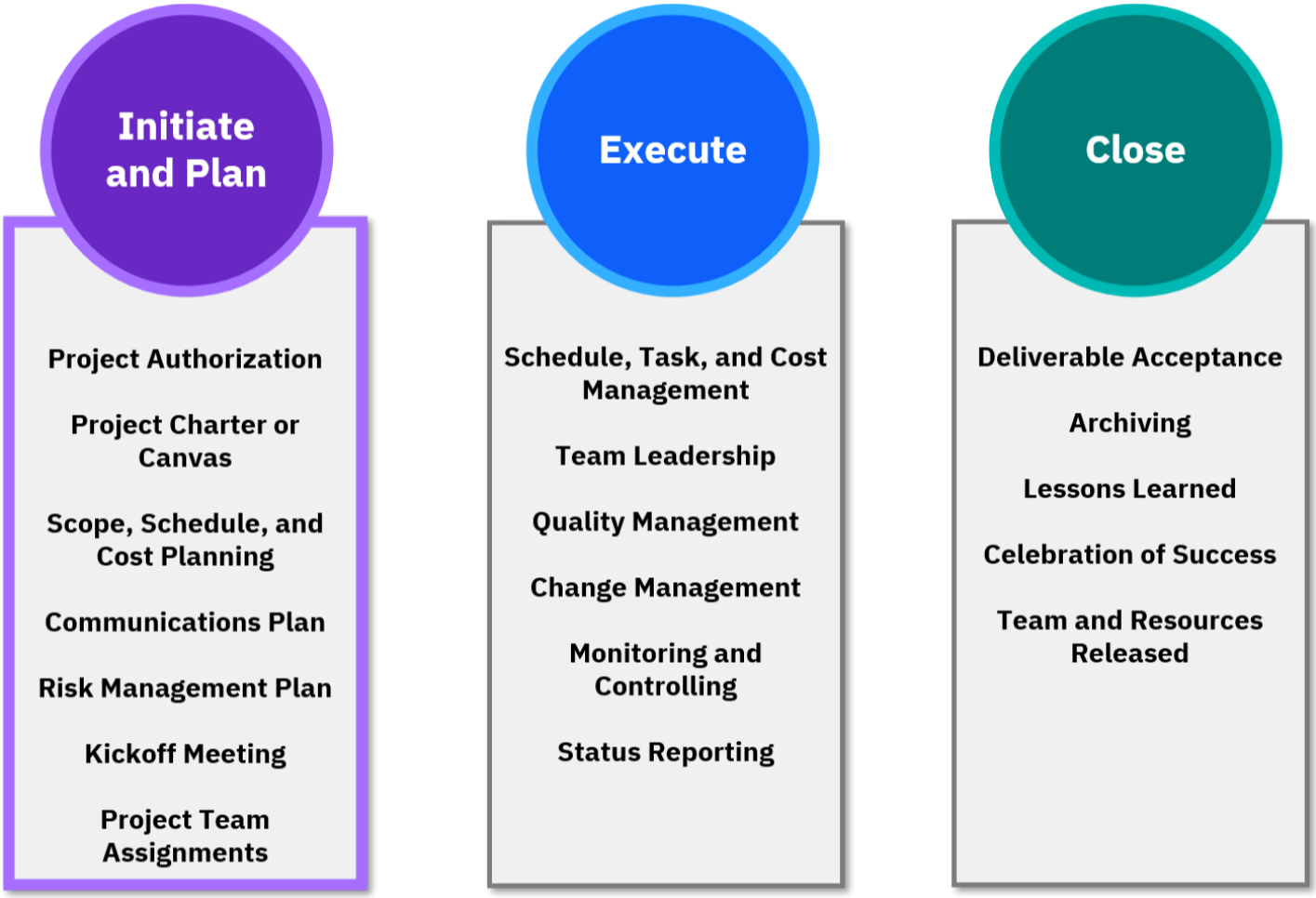
2 Minutos

Every project has a definite start and finish. Projects are divided into **phases** and these phases comprise the **lifecycle** of the project. Remember, there are many different models for the phases a project goes through during its lifecycle. In this course, the focus is on three traditional phases of project management:

1. **Initiate and Plan**
2. **Execute**
3. **Close**

You'll learn about some of the project management activities and best practices that are recommended for each project management phase. If you can grasp these phases, then you'll have a good grip on what project management is all about!

You'll begin with the **Initiate and Plan phase**.



Purpose: Once the organization authorizes the project, the project manager ensures that requirements are understood and the goals or objectives are agreed upon, establishes scope, defines the initial plans, and assigns tasks to the project team.

In this phase, the project manager is determining and documenting:

- What must be done?
- How will it be done?

- When will it be done?
- Who will do the work?
- What will it cost?

*Start learning about this phase now. Select **I've checked it out!** and then select **Next**.*

Initiate and plan a project / Initiate the project

10 Minutos

"Would you tell me, please, which way I ought to go from here?"

"That depends a good deal on where you want to get to," said the Cat.

"I don't much care where—" said Alice.

"Then it doesn't much matter which way you go," said the Cat.

"—so long as I get **somewhere**," Alice added as an explanation.

"Oh, you're sure to do that," said the Cat, "if you only walk long enough."

– Lewis Carroll, *Alice's Adventures in Wonderland* (1865)

It's understandable that projects often begin with great ideas or concepts, and participants are eager to get started on the work to develop the great ideas or concepts. But, with this "ready-fire-aim" mentality, teams might start working without ensuring that there is a proper understanding or definition or even the same mission and vision for the effort.

Let's begin here, with how to initiate a project right and make sure everyone knows where they're going!

Project charter

It's critical for the PM and project team to begin with a clear idea of the desired outcomes, so the project starts well, keeps momentum, and stays on track.

A project is often initiated and authorized through a **project charter**. It is issued by the project sponsor or client. The project charter may contain various levels of detail depending on the organization or project. Typically, it's a short document that explains the project in clear, concise wording. **It answers the question, "What will the project deliver?"**

The project charter lays out the project and may have some of the following elements:

- Project title

- Goal or objectives of the project
- Business objectives
- Requirements, at a high level
- Short description of the project
- Scope
- Key deliverables
- Major events in the project, called milestones, that have a start and end date
- Known risks at a high level
- Assumptions
- Budget
- Key stakeholders
- Approval process

This list is by no means exhaustive. Organizations can expand or shrink the project charter based on their needs and standards.

The project charter gives the project manager authority. The important activity for the project manager is to make sure the key stakeholders all agree that the project is approved or authorized to begin and that they support the project charter. It can be tempting to skip the project charter step. However, this one simple, low-effort, chartering activity ensures that everyone is on the same page going forward.

> A project charter is the guiding light for the project as it progresses. If the vision is lost, the PM can use the project charter to reset the course and remind everyone what the desired outcome is, if needed.

Project canvas

A **project canvas** is a simple one-page overview that everyone involved can use to understand and communicate about the project.

- It is a visual tool of the project charter components, such as the project's purpose, desired results, team resources, and milestones (the major events in the project).
- Organizations may have a particular template for the PM to use to create one.
-

The project team refers to it throughout the project to keep the vision in mind, monitor the project, stay motivated, and to orient new team members.

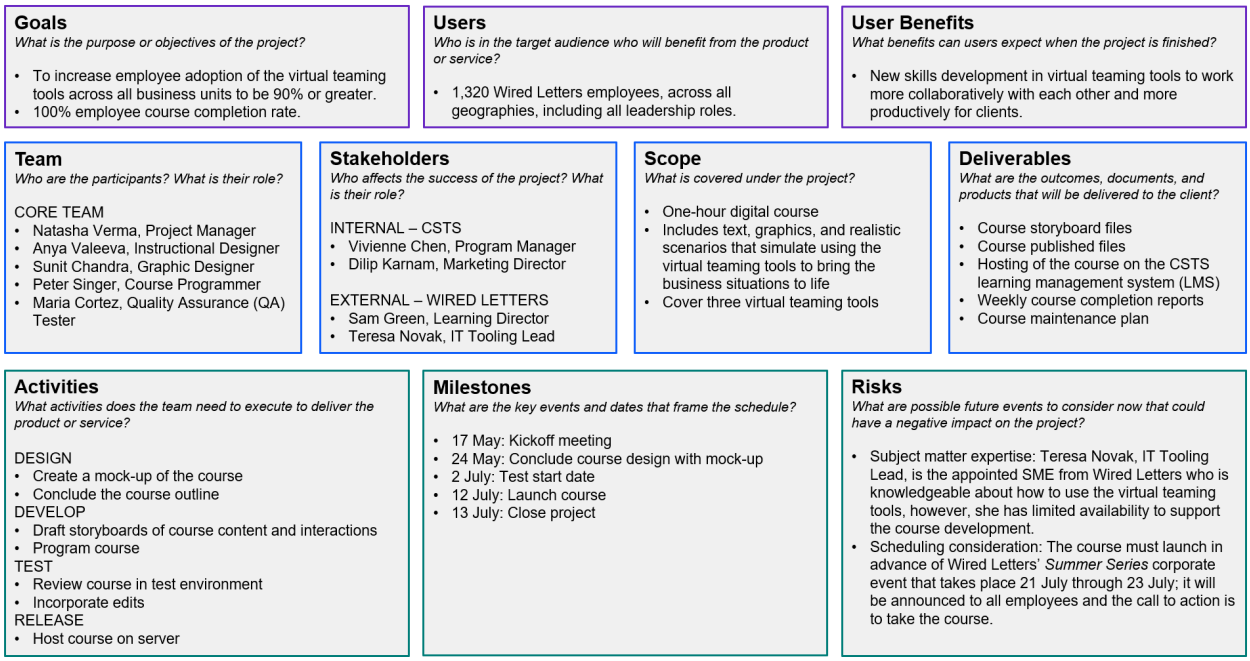
- The project canvas is also a helpful resource at the end of a project for the purposes of review and considering lessons learned.

Scenario: Wired Letters – Project Canvas

Remember, Natasha Verma is the Project Manager from City Star Training Solutions (CSTS) who is leading up the new course development project for her client, Wired Letters. The project is authorized to begin. Natasha created a **project canvas** to capture the vision for the project for herself and the team.

Take a couple of minutes to study the project canvas so you understand the project, who is on the team, the deliverables, planned activities, and even some early-identified risks.

Project Canvas: Wired Letters Virtual Teaming Tools course



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Initiate and plan a project / Plan the project

20 Minutos

Project management is not just scheduling. Projects have many plans! Projects have resource management plans, project schedules, communication plans, financial management plans, risk management plans, stakeholder management plans, and so on. It is good practice to think about **all types of plans** that should be included to make a project successful.

During the **Initiate and Plan phase**, a PM will draft the plans that are needed for the project lifecycle. In this course, you will learn about the project planning process to arrive at the project scope, schedule, and cost. And you will get an overview of a risk management plan and a communications plan.

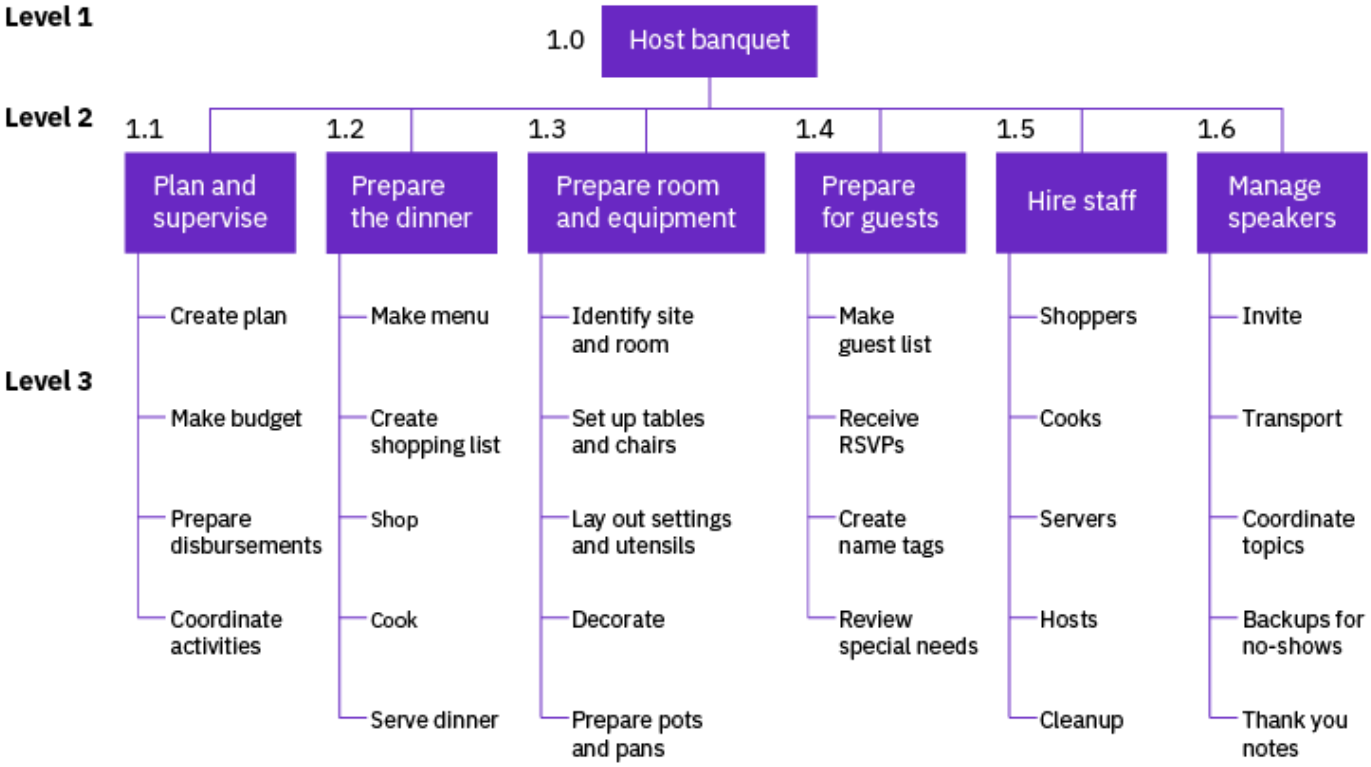
The project planning process involves **six steps** that result in several deliverables for the PM to guide the project.

Step 1: Define all activities

The first step in the planning process is to identify and define all activities and tasks that are required to create and deliver the project deliverables. The PM accomplishes this by using a **work breakdown structure**, often simply referred to as a **WBS**. The purpose of the WBS is to organize and define the project **scope**. A WBS is a hierarchical grouping of activities. Creating a WBS is simply a technique to “break down” the project into smaller units so that the work can be estimated, assigned, and tracked. It is important for PMs to start the planning process by creating a WBS to identify all project activities and tasks.

> **Scope** refers to all the work necessary to complete a project. It is identified during project planning using a WBS. If the scope is not properly defined early in the project, it can expand during the Execute phase because of unplanned activities. This is known as **scope creep**, and might cause projects to fail.

Take a moment to review this simple example of a WBS for a project to host a banquet. This is in a diagram format.



The diagram is just one way to represent the project WBS. It could also be represented in an outline format as follows. When planning a project, a PM typically uses a numbered list like this with an indented numbering system.

1. Host Banquet
   - 1.1 Plan and supervise
     - 1.1.1 Create plan
     - 1.1.2 Make budget
     - 1.1.3 Prepare disbursements
     - 1.1.4 Coordinate activities
   - 1.2 Prepare the dinner
     - 1.2.1 Make menu
     - 1.2.2 Create shopping list
     - 1.2.3 Shop
     - 1.2.4 Cook
     - 1.2.5 Serve dinner
   - 1.3 Prepare room and equipment
     - 1.3.1 Identify site and room
     - 1.3.2 Set up tables and chairs
     - 1.3.3 Lay out settings and utensils
     - 1.3.4 Decorate
     - 1.3.5 Prepare pots and pans
   - 1.4 Prepare for guests
     - 1.4.1 Make guest list
     - 1.4.2 Receive RSVPs
     - 1.4.3 Create name tags
     - 1.4.4 Review special needs
   - 1.5 Hire staff
     - 1.5.1 Shoppers
     - 1.5.2 Cooks
     - 1.5.3 Servers
     - 1.5.4 Hosts
     - 1.5.5 Cleanup
   - 1.6 Manage speakers
     - 1.6.1 Invite
     - 1.6.2 Transport
     - 1.6.3 Coordinate topics
     - 1.6.4 Backups for no-shows
     - 1.6.5 Thank you notes

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TAKE NOTE

- You can see there are three levels in the WBS example.
- Some of the level 3 activities could be broken down even further to level 4 and level 5.
- At this time, notice that the WBS activities are **not** organized into any kind of order. They are only categorized by activity.

PMs can conduct a team brainstorming session to identify the activities that will need to be done to complete the project. A brainstorming session, where there are no right or wrong answers, allows everyone involved to list the activities that they think will be needed for the project. Gathering this input helps to ensure that vital tasks are

not overlooked. The PM can sort and organize the brainstormed list of activities into a WBS.

Step 2: Estimate the effort

The second step in the planning process is to estimate the amount of work, or effort, that it will take to complete each of the activities and tasks that were defined in Step 1.

Effort refers to the **amount of work** required to complete a task. It is usually expressed in terms of person days or person hours. For example, “12 hours of effort” means if 1 person worked on this task non-stop that that individual can complete the task in 12 hours.

Projects create unique deliverables and estimating can be difficult for PMs and the team when working with the unknown. The most common approaches are to:

- Gather input from experts
- Look to previous project experience and estimates
- Use tables and formulas

> **Important note:** Effort is very different from duration. They are not interchangeable terms. **Duration** refers to the **time** required to complete the task. It is the difference between one point in time and another. It’s important for PMs and teams to understand the difference and communicate clearly. To further illustrate the distinction, if 2 equally skilled people work on the 12-hour task, it can be completed in 6 hours, but the amount of work is still 12 hours of effort.

Step 3: Sequence the activities

The third step in the planning process is to identify dependencies between the activities that were identified in Step 1, and then organize them into their correct order based on which tasks must start or complete **before** other tasks can start or complete. Simply said, with activity sequencing the PM is putting the project activities into a **logical order**.

In projects there are tasks that cannot begin until other tasks are complete. The terms **predecessor** and **successor** are used to describe these task relationships.

Example

An activity to install hardware cannot start until the hardware is delivered, and the hardware cannot be delivered until it is ordered. Now, let’s use the terms predecessor and successor. Hardware delivery is a predecessor to hardware installation. Likewise, hardware installation is a successor to hardware delivery.

There are other kinds of activity relationships in projects, such as:

- Sometimes activities must start and end at the same time.
-

Sometimes activities must finish at the same time, but they can start at different times as long as they finish together.

- Other activities might have to begin at the same point in time, but they can finish at other times, and so on.

These relationships between project activities and tasks are often referred to as **task constraints**. PMs sequence activities by identifying these task constraints so the project activities can be put into their logical order.

Step 4: Estimate duration

The fourth step in the planning process is to estimate how long each activity will take, or its duration. Task durations are very dependent on how resources are assigned to each task. This can be a challenging part of the planning process for PMs.

PMs estimate durations by assigning team members to each individual task based on their availability. PMs consider non-working days such as weekends, holidays, and vacations. There are several ways to make resource assignments.

Examples

- A single person can be assigned to work on a task full time. An individual assigned to a 12-hour task can complete the task in 12 hours. Assuming an 8-hour workday, this task will be complete 1 and 1/2 days from its start.
- Multiple people can be assigned full time to work on the same task. If two individuals can work on the same 12-hour task at the same time, they should be able to complete the work in 6 hours, or less elapsed time than one 8-hour workday.
- People can be assigned to work on a task for part of their time. A person who is assigned to work on a 12-hour task for half their time will work on the task 4 hours each workday. The task will take 3 calendar workdays to complete.
- Combinations of full-time and part-time resources can work on a task. A full-time person and a half-time person can complete the task in 8 hours. In theory, if the full-time person works on the task for 8 hours and the half time person works on the task for 4 hours, they can complete it within one 8-hour workday.

The art of the planning is to figure out how to best use resources to change task durations and dependencies so that the project can **complete as soon as possible** and to **determine if desired project completion dates are feasible**.

This is where project management software and tools are very useful for project managers. Such tools can help PMs create a **Gantt chart**. This is a popular method that PMs use to develop a **project schedule**. Schedules are one type of plan that organizes the work of a project along a time scale. Gantt charts help **visualize** the project. They are structured like a spreadsheet on the left and a timeline on the right. They show all project tasks in order and how they are interdependent, with a horizontal status bar for each task that has a start and finish date. This provides PMs with an interactive roadmap they can monitor and update throughout the project lifecycle for accomplished tasks, changes, and so on.

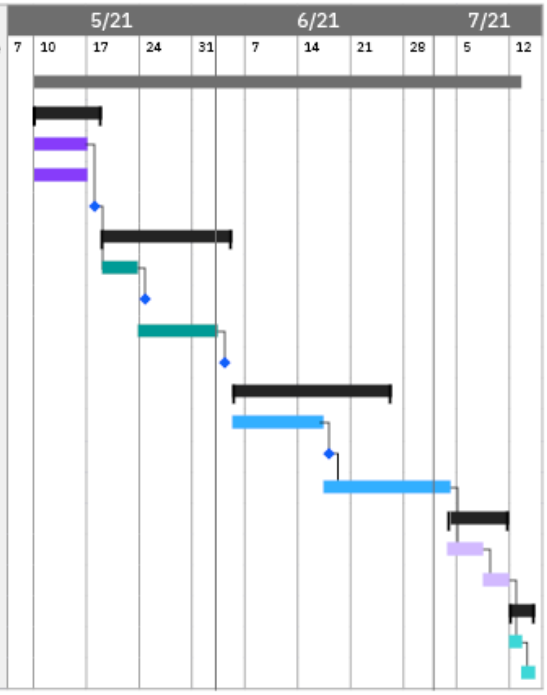
Scenario: Wired Letters – Project Schedule

Natasha Verma followed the previous steps to define the project activities, estimate effort, sequence the activities, and estimate duration. She used an online tool to develop the **project schedule using a Gantt chart**.

Notice there are phases of work and tasks on the left with planned dates across the timeline on the right. This schedule shows the project will meet its milestones from the project canvas, such as starting testing on July 2. The schedule also shows the project is planned to complete on time on July 12.

Take a couple of minutes to study the project schedule so you understand the work planned and durations, and the sequencing of the activities.

Wired Letters Virtual Teaming Course	Start	End	Duration (hours)	% Complete
Project Initiation	**10/05/21**	**17/05/21**	**14h**	**91 %**
Confirm charter and create canvas	10/05	14/05	10	100%
Define project scope	10/05	14/05	2	100%
Team kickoff meeting	17/05	17/05	2	0%
Design Phase	**18/05/21**	**03/06/21**	**42h**	**0%**
Create mock-up of the course	18/05	21/05	10	0%
Client approval of mock-up	24/05	24/05	4	0%
Draft course outline	24/05	02/06	24	0%
Client approval of course outline	03/06	03/06	4	0%
Development Phase	**04/06/21**	**01/07/21**	**148h**	**0%**
Draft storyboards	04/06	16/06	60	0%
Client approval of storyboards	17/06	17/06	4	0%
Program course	18/06	01/07	84	0%
Test Phase	**02/07/21**	**09/07/21**	**22h**	**0%**
QA and test course	02/07	07/07	12	0%
Make final updates	08/07	09/07	10	0%
Release Phase	**12/07/21**	**09/07/21**	**8h**	**0%**
Host course and official launch	12/07	12/07	2	0%
Close project	13/07	13/07	6	0%



Step 5: Estimate cost

The fifth step in the planning process is to produce an estimate for the overall project cost. PMs do this by estimating the cost of **each** WBS activity identified in Step 1 and then summing the individual costs to derive the overall project cost.

PMs calculate the cost for a project task by multiplying a resource's billing rate by the estimated task durations for all resources assigned to the task.

Scenario: Wired Letters – Estimating Task Costs

Let's see how the PM Natasha estimates the costs of some tasks. In the Wired Letters course development project, Natasha knows who the assigned CSTS team members are:

- Anya Valeeva, Instructional Designer
- Sunit Chandra, Graphic Designer
- Peter Singer, Course Programmer
- Maria Cortez, Quality Assurance (QA) Tester

Looking at her Gantt chart for the schedule, the task **"Draft course outline"** is assigned to **Anya** and the estimated duration is 24 hours. Natasha multiples Anya's hourly billing rate of **USD 65** by **24 hours** to estimate the total cost for the task to be **USD 1,560**.

Then, there are some other tasks that need to be performed by multiple team members at the same time. So, when Natasha estimates the **"QA and test course"** task that is a total of **12 hours**, she considers that Anya, Peter, and Maria will **divide** the work equally and she calculates their hourly billing rates, as follows:

- **Anya** will work for **4 hours** and her hourly rate is USD 65, totaling **USD 260**.
- **Peter** will work for **4 hours** and his hourly rate is USD 71, totaling **USD 284**.
- **Maria** will work for **4 hours** and her hourly rate is USD 76, totaling **USD 304**.

This task to ensure the quality of the course is estimated to cost a total of **USD 848**.

In addition to resource costs, the PM must estimate all other costs related to the project. This could include materials, software, tools, travel expenses, and so on.

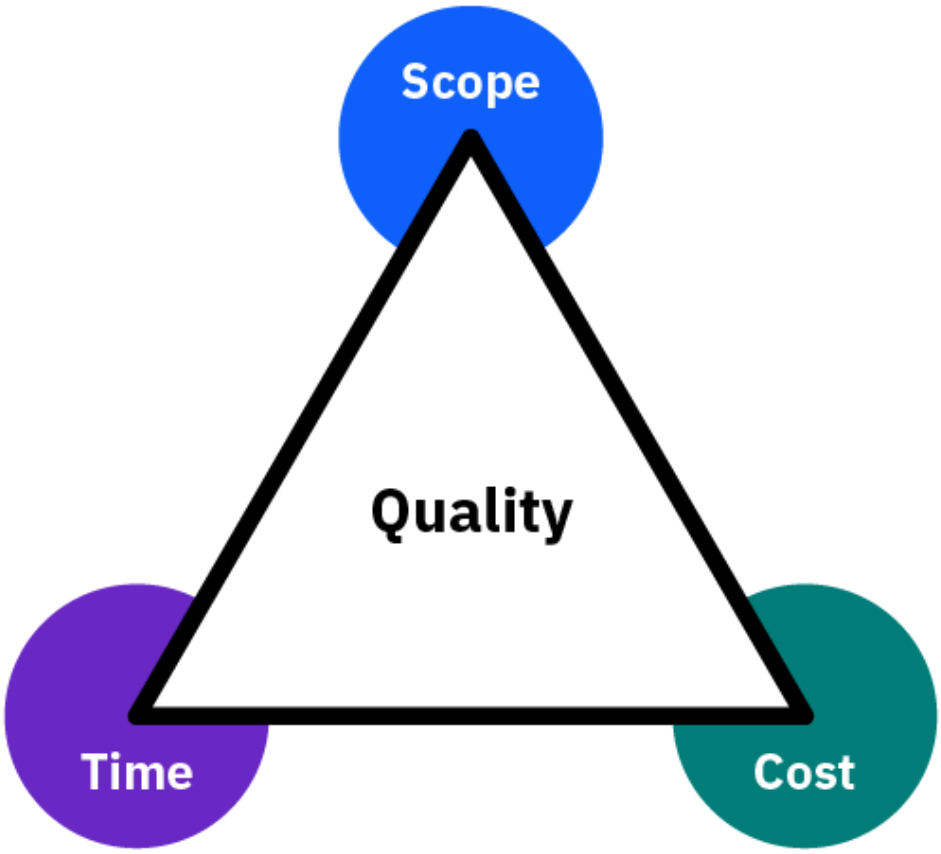
Project managers are responsible for estimating costs upfront here and then budgeting and controlling costs so that the project can be completed within the approved budget. The PM can monitor and control costs by entering them in a Gantt chart using the organization's software or online project management tools.

Step 6: Try for fit

The sixth step in the planning process is to put it all together. The PM determines if the scope, time, and costs included as part of this project planning align with the project objectives that were shared in the project charter. The PM might need to adjust and iterate until the scope, time, and costs are acceptable.

- **Scope:** The work necessary to complete the project
- **Time:** The schedule that covers the duration of all project tasks
- **Cost:** All costs associated with the project

The plan must adjust to the **triple constraint**, or **project management triangle**, which refers to the **scope**, **time**, and **cost** limitations that apply to every project.



This concept is a cornerstone of project management. The success of a project rests on these three pillars.

However, there are certainly other internal and external factors that might affect a project. Other constraints must be balanced, such as sustainability, impact, relevance, and customer satisfaction.

At the end of the six steps in the planning process, the PM will have what is called a "**baseline**" for the project from which to manage, using a work breakdown structure (WBS), a Gantt chart or project schedule, and any other plans.

The PM creates and maintains **many plans**, depending on the project and organization's requirements and the project management methodology. Next, you'll learn about two more plans that are common and valuable to projects:

-

Communications management plan

- Risk management plan

Initiate and plan a project / Communications management plan

7 Minutos

The PM is responsible for building and maintaining communication links during a project. This is critical for project success. Communications between the project manager, team, and stakeholders is crucial. Getting client feedback on a deliverable, asking a teammate where a file is saved, conducting a review and approval process, hosting a status meeting, and other daily project tasks all involve communication.

Communications management is the effective handling of communications for a project. It ensures that the appropriate communication channels exist with the appropriate people for the exchange of essential information so the project functions smoothly.

During the **Initiate and Plan phase**, a PM develops the **communications management plan** to define how information will be organized and shared to effectively manage communications for the project. It documents:

- The **type** of communication
- The **target audience** for the communication
- The **purpose** of the communication
- The **date or frequency** that the communication will occur
- The **method or format** to use
- The **person responsible** for the communication

The two primary types of communications that a PM documents in a communications management plan are **meetings** and **reports**.

> Virtual teams affect the types of meetings to plan and the communications media the PM needs to arrange.

Communications management plans are unique to every project. The plan ensures effective communications across the team, sets expectations for the team, keeps the team updated, and contributes to good stakeholder management. Communication is critical to keeping a good relationship with the client, and this plan helps the PM maintain a shared understanding of **what is happening** and **what should be happening** throughout the project.

When communicating with the client and stakeholders, it is important to check that the right people are receiving the right messages. Different messages are often directed at different levels within organizations.

The PM should review and update the communications management plan as necessary during the life of the project.

Scenario: Wired Letters – Communications Management Plan

Natasha is using her organization's template for the project's communications plan.

Take a couple of minutes to study each line for the planned communications activities, which include meetings and reports.

Communications Management Plan

Communication	**Target audience** *Who will you communicate to?*	**Purpose** *What is the topic of the message?*	**Schedule** *What is the date or frequency?*	**Delivery method** *How will it be delivered?*	**Owner** *Who will the communication be from?*	**Status** *Not yet started, in progress, or completed?*
Kick-off Meeting	Stakeholders, Project team	Orient everyone involved to project, share project charter, set expectations, share plans	17 May	Agenda, Virtual meeting, Meeting notes	Project Manager	Completed
Course Design Review Meeting	Stakeholders, Project team	Review and edit course mock-up	24 May	Agenda, Virtual meeting, Meeting notes	Project Manager, Graphic Designer	Completed
Project Team Meeting	Project team	Report status, identify issues, develop solutions as a team	Biweekly: Tuesday and Thursday	Virtual meeting 30 min	Project Manager	In progress
Status Report	Stakeholders	Communicate current progress, issues, and risks	Weekly: Friday	Online report shared via email	Project Manager	In progress
Course Quality Meeting	Project team	Discuss and develop quality assurance and testing plan	17 June	Virtual meeting, Quality criteria, Test plan	Project Manager, Quality Assurance Tester	Not yet started
Course Announcement	Stakeholders, Project team	Announce completed course and share course details	12 July	Email	Project Manager	Not yet started
Stakeholder Showcase	Stakeholders, Project team	Present completed course and learning experience; confirm deliverable acceptance; close out the project	13 July	Agenda, Virtual meeting, Close out documentation	Project Manager	Not yet started

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Initiate and plan a project / Risk management plan

7 Minutos

Risks are inherent in any project. All projects have some degree of uncertainty because of the assumptions associated with them and the environment in which they are executed. PMs cannot eliminate project risks entirely, but PMs can anticipate, reduce, and mitigate many risks. What could be a risk to a project?

Examples

- The project purpose is not well-defined and causing confusion.
- There is a change in scope (scope creep).
- There is an error in estimating the cost of a resource or asset needed for the project.
- The client asks for additional work or a new deliverable because of a new direction.
- An unanticipated legal review is causing delay.
- Stakeholders require more review time than what was planned.

You can see risks can often lead to impacts to project scope, time, and cost.

Risk management is the process of anticipating future events that could negatively impact the project and then defining the activities to minimize the probability and impact of those events.

Risk management helps PMs prevent surprises and avoid “management by crisis.” Risk management is part of the planning endeavors during the **Initiate and Plan phase**. The PM should develop a **risk management plan**.

Shown here is a basic example of what a risk management plan could look like. It documents how the team will monitor and respond to risks that could impact the project. It can be simple or complex, depending on the project and the organization’s standards. At a minimum, the PM will answer:

- When and how will the risk be assessed?
- What is the responsibility of the “risk owner”?
- When does a project risk trigger an escalation?

Risk management is usually done on larger projects, but even for small teams, a short sync-up with the team to help identify potential problems in the plan helps guard against the unexpected and ensures that you have a plan of action in case the unexpected does occur.

Once the risk management plan is set up, the PM must track and control risks. The PM can do this by creating a **risk log**. A risk log documents the identified risk, estimated risk severity, planned response, and risk owner for all risks on a project. The PM should review and update the risk log at regular intervals during team meetings

throughout the project lifecycle.

Risk Management Plan
How our team will manage risk

Project	
Project goal	
Why should we manage risk?	
Risk management approach	
What to do if you own a risk?	
When does the risk trigger an escalation?	
Where is the risk log?	

Scenario: Wired Letters – Risk Log

Natasha is also using her organization's template for the project risk log. She identified a couple of risks at the start of the project when considering the project scope and providing the visual project canvas to the team.

In her project risk log, Natasha is assessing and color-coding risks so there is a visual display of:

- The likelihood of the risk occurring
- The impact if the risk occurs
- The severity, based on the likelihood and impact

Take a moment to see how she logged the risks in the risk log, and how there is room should she identify more risks to the project.

Risk Log

ID	Date raised	Risk description	Likelihood of the risk occurring	Impact if the risk occurs	Severity *A rating based on likelihood and impact*	Owner *The person who will manage the risk*	Mitigating action *Actions to mitigate the risk to reduce the likelihood*
1	17 May	**Subject matter expertise**: Teresa Novak, IT Tooling Lead, is the appointed SME from Wired Letters who is knowledgeable about how to use the virtual teaming tools, however, she has limited availability to support the course development.	Medium	High	High	Wired Letters • Sam Green, Learning Director of Wired Letters • Teresa Novak, IT Tooling Lead	Sam Green and Teresa Novak are meeting with Teresa's director to free up more of her time to support the course.
2	17 May	**Scheduling consideration**: The course must launch in advance of Wired Letters' *Summer Series* corporate event that takes place 21 July through 23 July; it will be announced to all employees and the call to action is to take the course.	Low	High	Medium	CSTS • Natasha Verma, Project Manager	Natasha will manage the project to stay on schedule to complete the course on 12 July.
3							
4							
5							

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Initiate and plan a project / Assemble the project team

6 Minutos

Project managers cannot manage the project alone; they need a team of skilled people! A PM can build a successful project team by taking the following steps:

1. Select the right project team members with the right knowledge, skills, abilities, and experience that the project demands.
2. Organize the project team around a common set of values and ensure they are all introduced to the project charter.
3. Ensure open, easy, frequent communication across the project team and use the communications management plan.
4. Maintain the project team after it is formed and pay attention to consistently:
    - Motivate the team members
    - Recognize and reward team behavior and successes
    - Respond to changes in a timely way as team members are added or leave the project team

When a group of individuals truly becomes a project team, they are committed to the team's values and objectives. They learn to work well together, enjoy working together, and most importantly they produce the high-quality results that are key to a successful project.

Project kickoff

What is the purpose of a project kickoff meeting? And, what do PMs need to cover and achieve to start a new project on the path to success?

The **Initiate and Plan phase** includes a **project kickoff meeting**. This is the first meeting with the project team, stakeholders, and the client. The purpose of the meeting is to ensure everyone understands the project, including the scope and schedule, and how the project team will work together.

The PM should set an agenda and facilitate the meeting to clearly communicate what the project team needs. The PM should cover topics such as the following.

-

Introductions: Take some time to introduce or let everyone introduce themselves. This might be the first time some people are meeting each other. Especially in business, projects could involve people from various fields or organizations that do not typically work together.

- **Project background:** This is likely the first time most of the project team is learning about the project. Why are they getting together? Take some time to share and agree upon the project goals, business objectives, and purpose of the project.
- **Scope and deliverables:** Spend a good amount of time on this topic. Be sure that everyone understands what is in and out of scope for the project, and what deliverables the project team is expected to provide at the end. The project team needs to understand what success looks like for the project.
- **Roles and responsibilities:** Identify all the groups and individuals who are working on the project and share a short description of their roles across the project lifecycle. Make sure everyone understands what is expected of them here at the start of the project.
- **Schedule:** At a high level, it's important to communicate the high-level project schedule. What are the major milestones and key dates?
- **Ways of working:** How will the team work together? Share the communications plan for meetings and reports and encourage open communication.

Depending on the project, other topics can certainly be included.

> The project kickoff meeting is an opportunity for the PM to set the tone for the project, motivate the project team, and instill confidence in the client. Done successfully, a project kickoff meeting will help contribute to the success of the project.

Delegate tasks to the project team

Once the project team is assembled and the project is kicked off, the project manager must assign tasks to each team member based on their competencies. The PM has done all of the project planning so far and now the PM shares out the assignments. The PM should be specific, provide start and end dates for each task, and show the project team members where they can find the project schedule. This is where various project management tools and software can be used, depending on the organization's standards.

The PM will support, monitor, motivate, and empower project team members, and track the completion of the tasks in the next phase, **Execute**.

Scenario: Wired Letters – Project Kickoff

Natasha and the project team are ready! They successfully conducted a project kickoff in a virtual meeting on the date that Natasha planned. Here are some highlights about how it went.

- Most of the CSTS team members knew each other from previous projects, but Natasha made sure to conduct introductions because the external stakeholders needed to meet everyone. Teresa Novak, the Wired Letters IT Tooling Lead, is going to be the subject matter expert (SME) for the course. She was happy to meet the team, as was Sam Green, the Wired Letters Learning Director.
- When talking about the project scope and deliverables, Natasha took the team through the project canvas. The team understood and agreed on the deliverables.
- Natasha also showed them the Gantt chart, so she feels confident everyone knows the project schedule, including the ordering of the tasks.
- Natasha asked everyone to share planned vacation time so she can consider these requests as part of the schedule.
- And, the team discussed how they will work together. They plan to have a project team call every Tuesday and Thursday, and to stay in touch using email and the team's online board to share findings and ask questions so they can work as efficiently as possible.
- Everyone was excited for the new Wired Letters project and ready to begin the next day!
- Natasha felt like she got buy-in from her CSTS team and the client, Sam Green, and the SME, Teresa, from Wired Letters.

After the meeting, Natasha sent meeting notes, set up an online project folder on Wired Letters' shared platform to store all documentation, and gave everyone access.

Natasha also set up a one-on-one call with Anya (instructional designer), Sunit (graphic designer), Peter (course programmer), and Maria (QA tester) to go over their assigned tasks, make sure they have the resources they need, and answer any questions.

Initiate and plan a project / Wrap-up and mini quiz

8 Minutos

"Before anything else, preparation is the key to success."

– Alexander Graham Bell, inventor, scientist, and engineer

You should have a good understanding of the **Initiate and Plan phase**. Having a plan for how to get things done is the foundation to delivering any project well. Remember, the purpose of this phase is to ensure the goals or objectives are agreed upon, establish scope, define the initial plans, kick off the work, and assign tasks to the project team.

> Keep these PM best practices and considerations in mind for the **Initiate and Plan phase**:
>
> - Avoid tendencies to jump right into project execution activities. Schedule planning meetings with the project team, and include time for planning in project schedules and estimates.
> - Get the team's buy-in and involvement early. The people who do the work should help plan the work. The people doing the work know best what is required to deliver the project.
> - Also, get the clients and stakeholders involved early and often.
> - Change is inevitable and constant. Be prepared to replan. Some things are within a PM's control and other things are outside of the PM's control. A risk management plan and continuous reviews of the risk log can help respond to risks quickly.
> - If the communications management plan is well-defined and was successful, save it for reuse on similar projects.

Interested in learning more?

Here are some curated online videos and resources to check out if you want to explore more about the topics you just learned about:

- **Top 3 Project Planning Steps (https://youtu.be/X5wF4vKpxiU)**, a video by ProjectManager.com
- **Project Planning in Project Management (https://youtu.be/t1iVMYmW-Ko)**, a video by Simplilearn
- **A Project Manager's Guide to Work Breakdown Structure (https://thedigitalprojectmanager.com/work-breakdown-structure/)**, an article by Emily Luijbregts for The Digital Project Manager
- **How to Create a Gantt Chart in Google Sheets (https://youtu.be/8eKk0M2zGIk)**, a video by Vertex42
- **Free Project Management Templates (https://www.projectmanager.com/pm-templates)**, provided by ProjectManager.com
- **Project Communication Plan Examples and How to Make One (https://thedigitalprojectmanager.com/how-write-project-communication-plan/)**, an article by Natalie Semczuk for The Digital Project Manager
- **How to Build a Great Project Communications Plan (https://youtu.be/HULx9Gni9Og)**, a video by Online PM Course - Mike Clayton
-

Project Risk Management - How to Manage Project Risk (https://youtu.be/xXV_gjtXMSk), a video by Online PM Course - Mike Clayton

Let's wrap up with a mini quiz to check your understanding of the concepts presented.

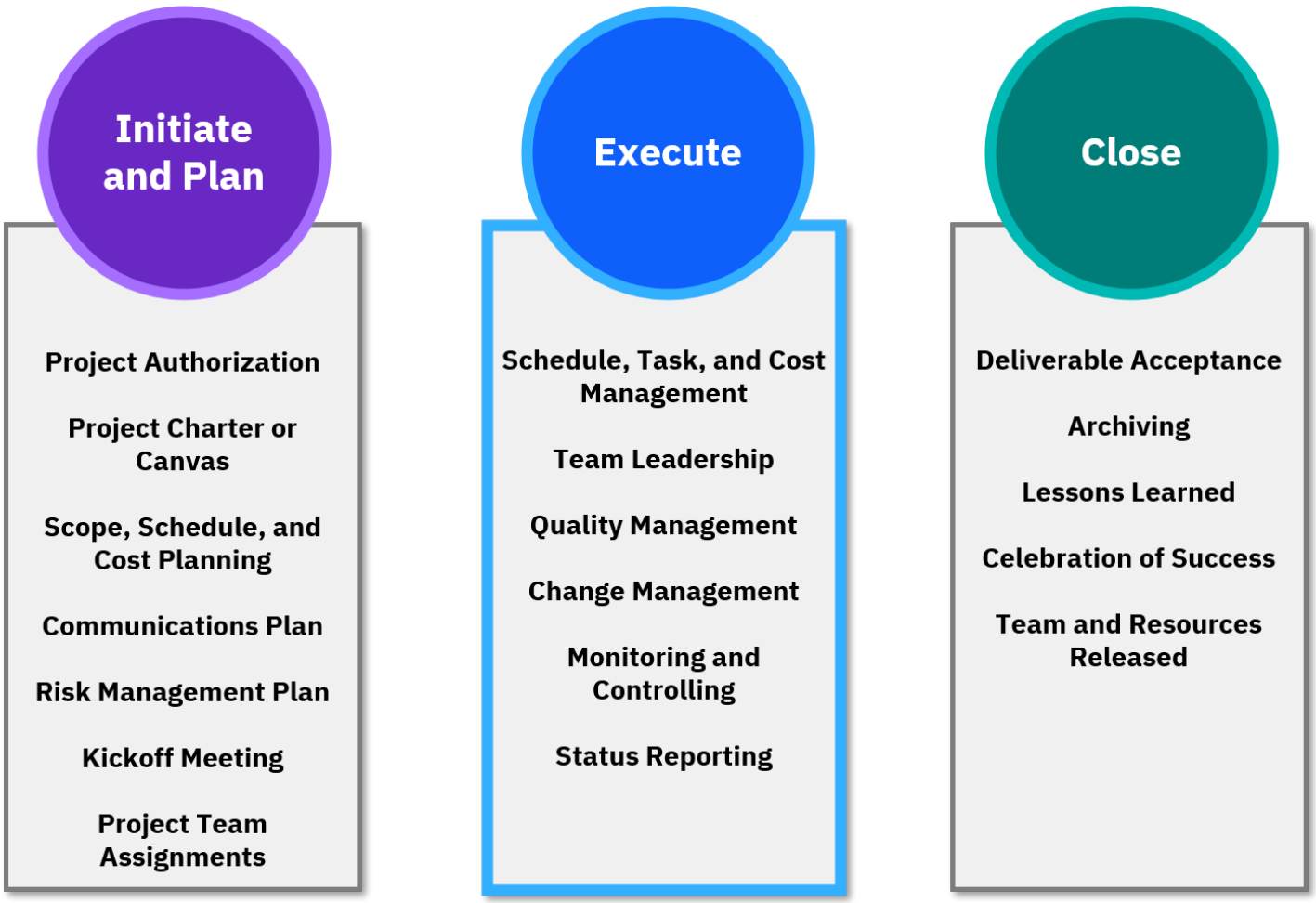
*Select **I've checked it out!** to begin.*

Execute a project / Purpose

2 Minutos

The project manager and the project team worked through the planning of the project in the previous **Initiate and Plan phase** and now they have a solid strategy for the project!

Let's move forward in the lifecycle to the **Execute phase** of project management.



Purpose: The project team collaborates to complete assigned tasks and the project manager focuses on

monitoring all activities to create the product or service, as detailed in the project plan.

The **Execute phase** is when the project team builds the deliverables, and it's when the project manager implements the plans to manage and monitor the team's activities.

This phase includes all of the tasks the project team will perform that directly lead to the development of project deliverables. This includes activities such as writing code, manufacturing hardware, providing services to implement an IT solution, writing marketing content, creating a learning program, testing software, and so on. In addition, the project manager performs critical tasks, including:

- Managing the schedule, tasks, and cost
- Leading the project team and resources
- Encouraging teamwork and facilitating meetings
- Resolving conflicts and crises
- Managing reviews, approvals, and the quality of the deliverables
- Managing changes
- Reporting on progress

The **Execute phase** takes the longest amount of time compared to the other phases. It's where most of the development work and cost of the project is expended.

*Start learning about this phase now. Select **I've checked it out!** and then select **Next**.*

Execute a project / Manage schedule, tasks, and cost

12 Minutos

The goal of a project manager is to deliver the project on time and within budget. PMs use their knowledge and skills and project management tools to do their best to control the process to maintain the schedule and budget. But, things do not always go according to plan. The PM must always monitor, day-to-day and week-to-week, to catch any issues quickly and determine solutions quickly to maintain control.

Schedule management

Are due dates being met that match the schedule and are in-scope?

Effective schedule management means greater productivity. The PM created a "baseline" project **schedule** in the **Initiate and Plan phase**. The PM must now monitor the schedule to make sure the project stays on track. The PM will use this project schedule to:

- Track the progress of the project (what was planned versus actual progress)
- Report how the project is progressing to the team and sponsor or client
- Determine whether to revise the project to meet major milestones and completion dates
- Determine whether to accept or reject a change based on how it affects schedule, tasks, cost, and the project completion date

Overall, the PM monitors project progress and compares it against the plan to identify **variances** so the PM can take **corrective actions**, when necessary, to keep the project on track. When considering a course of action to take to address a variance, projects have fairly limited options. This is actually a good thing from a project management perspective. Remember the triple constraints: scope, time, and costs.

If the PM **can** adjust the "baseline," then the PM has these options:

- Add resources, which increases cost
- Add time, which impacts the schedule
- Reduce the deliverables, which impacts scope
- Implement some combination of the above that is acceptable to all involved

If the PM **cannot** adjust the "baseline," then the PM must identify more creative ways to stay within scope given the resources allocated to the project. Options might include:

- Re-allocate resources
- Re-prioritize work
- Re-sequence work

Task management

Is the right work being performed at the right time?

The project team is executing their **tasks** in this phase. To make sure a task is done correctly and within the project schedule, the team needs to know their tasks and the PM needs to manage every step along the way.

Cost management

Is the project on budget?

Just as the PM planned a schedule, the PM also has a planned **budget**. But that does not mean the PM's job is done. The original, allocated budget is a "baseline" from which the PM can measure the **actual** spending during a project. The PM must always monitor cost expenditure and control the project costs to keep them within the agreed budget.

> Many projects require having to purchase, rent, or contract with outside resources or vendors. This process is called **procurement**. It's a part of the costs that a PM must manage.

Project tracking and control

Tracking and control is an essential part of project management that contributes to project success.

Tracking is the way the PM keeps a project moving. Unfortunately, projects often get delayed because the tracking part of the project is executed improperly. The scenario usually goes something like this:

"The PM has a conversation with a resource at a meeting, by phone or in a chat room. The resource tells the PM they have it under control and will have it done by an agreed time. The PM assumes the resource will do what he or she promised. Come status time, nothing has been done. Excuses range from "I'm waiting for somebody to finish a task" to "My computer got burned when my car caught on fire after entering Chilly Willies to buy a coffee." However, when the PM asks why the resource didn't say something, the answer is usually "You didn't ask!" The moral of the story is that the PM needs to follow up before the target date for a task. A simple email on how things are going with the task should suffice."

Source: 9 keys to successful project management (https://www.ibm.com/downloads/cas/J1OBPJZY), IBM Systems Lab Services whitepaper by Eliuth Pomar, Svetlana Tuncheva, and Kalina Goranova, 2023.

A good project tracking discipline helps project teams understand as early as possible when corrective action is needed. As work proceeds, the PM will expand or refine the plans on a regular basis. PMs can use a variety of project tracking methods, such as using a template from their organization or approved project management software. For instance, you learned about the **Gantt chart**. The PM can perform all schedule, task, and cost management tasks in a Gantt chart to track the "baseline" and actuals.

The **project control** process, like many other project management activities, is an iterative process the PM repeats many times throughout the lifecycle of a project. Overall, the PM is responsible for executing these four project control steps.

Expand each section to learn more.

1. Establish standards

The PM is responsible for establishing the standards by which the project will be measured and the plans that define how the project will be executed.

2. Observe performance

After a PM establishes the plans, procedures, and standards, the PM observes how the project is progressing. In this step, performance information is collected from several sources, including meetings, reports, briefings, letters, audits, and observations.

3. Compare planned with actual performance

When a PM has collected appropriate performance information, the PM then compares the project's status with the standards and expectations. This step answers two questions:

1. How is the project doing?
2. And, if variances from the original project plan have occurred, what caused the variances?

4. Take corrective action

Finally, the PM decides what, if any, corrective action should be taken. This step involves activities such as revising plans, reallocating resources, and changing the way the project is organized or managed.

> Based on knowledge and experience, a PM will get better and better at detecting issues and finding solutions.

Scenario: Wired Letters – Project Tracking and Control

On a Tuesday project team call, the instructional designer, Anya, shared she planned to work on the course outline that day with the SME, Teresa, but their meeting was postponed. Teresa asked to reschedule it to Thursday.

Natasha was quick to review the project schedule and noticed this **could** present a delay. The plan is to complete the "**Draft the course outline**" task over **8 business days** and within **24 hours** of time for Anya. This would mean missing two possible business days for Anya and Teresa to draft the course

outline. Remember, Natasha knew and had identified early on that Teresa's lack of availability to support the course development effort was a risk.

Natasha does not want this task to slip. She made the decision to send an email to Teresa, copying Anya and the client. She shared that the team wants to avoid any delay working on the course outline so it can be completed on time and subsequent tasks stay on track. Natasha proposed meeting the next day, Wednesday, instead of Thursday. Teresa emailed everyone back that she understood and could be available for a one-hour virtual meeting on Wednesday. Natasha replied to all, "Wonderful and thank you!"

You can see how important it is for a project manager to always monitor the team's performance and listen to everyone's status to determine if there are any project impacts. In this case, Natasha took a simple and quick corrective action to ensure the task stayed on schedule. The one-day adjustment did not impact cost or the schedule.

Execute a project / Lead the project team

6 Minutos

Once the **Execute phase** begins, the PM's planning will lead the way, but project teams need guidance and leadership is a vital competence for the PM. PMs craft their own leadership style and methodology to build and lead a strong project team.

High-performing project teams

The PM is responsible for leading and motivating people to ensure the project team is **high performing**. This means that the project team has high morale and is getting the job done. It's also about talent, trust, the physical environment, and recognition. A project team could be considered high performing if:

- The breadth, depth, and caliber of project manager and project team knowledge, skills and abilities are appropriate for all phases.
- Morale, motivation, energy, and collaboration across the project team is high.
- Environment and facilities support productive and effective teamwork.
- Roles and responsibilities are clear.

Healthy signs of a team

- Morale is good.
- There is open communication.
- The team is diverse.

Unhealthy signs of a team

- Tension can be felt.
- Turnover of team members is high.
- Working conditions are poor.

Here is a list of some project management techniques that PMs use to successfully lead the project team.

1. **Establish a clear project scope**. PMs must define and communicate the scope of the project.
2. **Plan globally and think locally**. PMs must keep the entire scope of the project in mind while being ready to act decisively on a day-to-day basis. Essentially, keep the “big picture” in mind and be detail-oriented at the same time.
3. **Promote teamwork and collaboration**. PMs must use their team-building skills and encourage collaboration.
4. **Provide tools and resources**. PMs must provide the project team with the tools and resources they need to be productive and stay in close communication, whether the team is working at the same location or working remotely.
5. **Anticipate and address conflict**. PMs must use their leadership and conflict management skills to proactively address potential issues among the project team members, client, or stakeholders.
6. **Manage stakeholders**. PMs must identify the individuals who are the “influencers” who can affect the project. This also involves knowing the goals of the stakeholders and choosing the right approach to manage them

and their expectations.

7. **Engage in continual project management planning**. PMs should consider input and feedback from the project team as they manage the project daily.

Project meetings

Every project requires regularly scheduled **meetings** to keep the team focused.

Expand each section to learn about types of meetings.

Kickoff meeting

A project manager will host a **kickoff meeting** at the very start of the project, during the **Initiate and Plan phase**. You learned the purpose of this meeting is to introduce the team, understand the project background and goals, and lay out what needs to be done from start to finish by the team.

Status meetings

Then, there are periodic **status meetings** for the project team during the **Execute phase**. Project status meetings keep the momentum going for the project. They serve to keep everyone informed and hold all team members accountable for completing their tasks.

> **Note:** In an Agile approach to managing projects, the project team meets more often (in some cases even on a daily basis) either to check the status of the project (what is done and how it was done), and/or to plan what needs to be done in the next iteration of the project (and what impediments might arise).

Stakeholder meetings

The project manager will also host **stakeholder meetings** to update stakeholders, perhaps monthly. These meetings are usually for the most influential stakeholders. A well-organized meeting in this case is critical for making a positive impression. It's important for the PM to keep stakeholder attention and support throughout the project to ensure success.

Scenario: Wired Letters – Stakeholder Meeting

Since Wired Letters is a new client for CSTS, Natasha decided to add a monthly stakeholder meeting to her communications management plan. Natasha wants to ensure CSTS makes a positive impression, and she needs ongoing support from all stakeholders.

She hosted the first virtual meeting on the last Thursday of the month with the CSTS internal stakeholders and Wired Letters external stakeholders:

- Vivienne Chen, CSTS Program Manager
- Dilip Karnam, CSTS Marketing Director
- Sam Green, Wired Letters Learning Director (client)
- Teresa Novak, Wired Letters IT Tooling Lead

Everyone was engaged and interested in finding out about the progress of the virtual tooling course. Sam asked a couple of questions and Natasha provided informative answers. Natasha also asked Teresa if she anticipated being able to devote SME time to the upcoming tasks, and she confirmed she would.

This meeting and the upcoming stakeholder meetings will certainly help in the project's continued success!

Running a successful meeting

In general, the project manager needs to do the following to host productive meetings:

- Have an objective and set an agenda in advance to plan for what the meeting will accomplish and to have a valuable conversation.
- Facilitate the meeting, which includes introducing the participants if they have not met yet, discussing topics and presenting documents based on the agenda, validating decisions being made, and gaining agreement on next steps to take.
- Share out meeting notes about what was concluded and update any project planning or reports, as necessary.

Considerations for a multicultural team

When managing a multicultural team, PMs must consider variations in social customs, time zones, protocol practices, and language proficiency. Failure to recognize differences often leads to hurt feelings and misunderstandings that might affect the smooth functioning of the project team.

Here are some general, helpful guidelines for PMs and project teams:

- Conduct project meetings during times that are waking hours for all participants.
- Be considerate of holidays and work hours, both of which differ across cultures.
- Avoid using slang, colloquialisms, and nuances when communicating with people for whom the language in use is not a first language.
- Avoid humorous remarks because they are not always funny in other cultures.
-

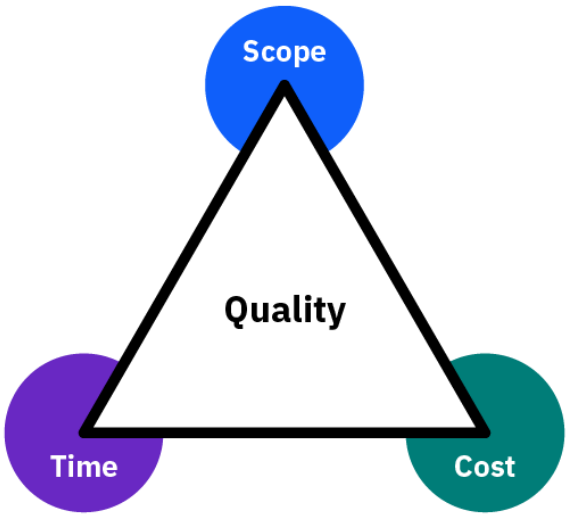
Be considerate of other cultures' protocols. These might include showing respect for management, avoiding public appraisals, and deferring to senior members.

> Embrace all cultures! Culture exists in many forms and places, and in professions, organizations, and departments.

Execute a project / Manage quality

3 Minutos

It does not matter if the PM delivers the project on time, meets every milestone, and completes the project on budget if the deliverable does not meet quality standards. That's why project quality management is so important. The final product or service must be of high quality. Remember the triple constraint? **Quality is at the center!**



The PM is responsible for ensuring that the overall project satisfies quality criteria. The PM does this by **establishing a plan for quality**, **performing quality assurance**, and **performing quality control**.

Expand each section to learn more.

Establish a quality plan

- The PM creates a **quality plan** as part of the project planning at the start of the project, and then maintains it throughout the project lifecycle.
- It identifies requirements for the quality of the deliverables and the team's process for meeting the requirements.
- It also includes metrics for measuring quality to meet stakeholder expectations.

Perform quality assurance

- **Quality assurance (QA)** is simply the process of assuring that the quality plan is adequate for the project and that the project quality plan is followed.
- The PM uses quality assurance to make sure the project is working towards the deliverable to meet quality requirements.
- It helps drive client and stakeholder satisfaction and prevent troubled projects.
- The PM could use a process checklist or a Gantt chart to keep track of quality targets.

Perform quality control

- The PM must monitor quality throughout the project lifecycle to ensure quality requirements are met.
- If the quality requirements are not met, the PM needs to adjust to get quality back on track.
- Some ways the PM can ensure that the quality of the deliverable is being achieved are through a coordinated review and approval cycle and testing. For instance, there could be a QA lead on the project to perform testing to ensure quality deliverables.

A key to effective project leadership is for the PM to instill in the project team the **importance** of focusing on the quality of their work **and** the quality of the products and services they are delivering.

Execute a project / Manage change

8 Minutos

Projects seldom proceed according to plan. Changes are inevitable and cannot be ignored. When unplanned events or exceptions occur during the **Execute phase**, the PM will use a project controlling procedure called **change management**. Change management is a formal process to record and track changes to a final resolution, which can be **accepted and included, deferred, or rejected**.

The purpose of change management is to avoid unauthorized work, “slippage” in the project timeline, extra cost or “scope creep,” and communication problems. Some changes in projects impact the triple constraints (scope, time, and costs) and some changes do not.

The ability to manage change is a critical skill for PMs to have. The PM should define the steps for handling changes on every project in a **change management plan**. This procedure should be clearly stated and documented during the Initiate and Plan phase. Everyone must understand how project changes will be identified, documented, tracked, communicated, reviewed, approved, and implemented. PMs can use a change tracking tool or template from their organization.

PMs use the change management process to ensure all proposed changes are:

- From authorized people
- Assessed for impact to the project schedule and cost
- Approved by the right people
- Communicated properly to everyone

Steps to manage change

When managing change on projects, PMs follow these overall steps:

1. First, **identify the change**. The PM will clarify the scope of the requested change and document it in a **project change request (PCR) form**. Who is requesting the change? Why is the change needed? What effort is needed to investigate the change? The PM decides whether to approve, reject, or defer the change request.
2. Second, **investigate the change**. The PM will analyze the change request to determine the impacts of the change to the project and its benefits. Is an alternative possible? Or, is the change needed for the project to succeed? The PM reviews all changes to determine if the scope, schedule, or budget are impacted, even for seemingly simple day-to-day changes. And the PM estimates the cost of the change request.
3. Third, **implement the change**. The PM will make sure the PCR is formally approved by the right stakeholder. The PM will update the project schedule, budget, and scope as required. The PM allocates team members to handle the change. The PM will document the change and communicate the impact and change details to stakeholders, including the person who requested the change. The team will implement the change to the project.

Scenario: Wired Letters – Project Change Request

About midway through the project, Sam Green set up a virtual meeting with Natasha. He shared the purpose of the discussion was to go over a new development regarding the Virtual Tools for Collaboration course.

The experienced PM Natasha is anticipating a project change! What could it be?

Expand each section to find out how Natasha will handle this project change request.

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1. Identify the change

When they met, Sam said his Learning and Development team realizes it's critical for Wired Letters to measure employees' learning. He wants to add a final assessment to measure the learning of the concepts presented in the course. Natasha understood and agreed this is a good instructional strategy and best practice. She gathered the requirements from Sam and offered the features that City Star Training Solutions can provide. She confirmed an online final assessment could be integrated in the course. Natasha shared this would impact the scope of the project, and Sam understood.

Natasha asked Sam to fill out the **PCR template** to formally capture the description of his change request.

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2. Investigate the change

Once Natasha received his PCR, she did her investigation. She estimated the schedule and cost impacts due to this scope increase for a new deliverable: the final assessment. She consulted with her team, in particular the instructional designer Anya and course programmer Peter, to confirm her thinking and estimations since they would be performing the new work.

Natasha concluded the schedule will be impacted and need an **additional 4 days**. She also calculated that the change request would **cost USD 1,218**. She updated the PCR document and submitted it to Sam and her CSTS program manager to consider for approval.

---

3. Implement the change

Both parties approved the PCR!

Take a moment to open and review the approved PCR to check out the details.

(https://ibm.box.com/shared/static/5oq6bw1rh9jq62mmfultjjju8x2vxayh.pdf)

Project change request
(https://ibm.box.com/shared/static/5oq6bw1rh9jq62mmfultjjju8x2vxayh.pdf)

Next, Natasha will update the project schedule (Gantt chart) and increase the budget to accommodate this change, and the team will perform the work to design, develop, and integrate a final assessment in the course. She will also post this documentation in the team's project folder.

You can see how Natasha followed the overall change management steps to **identify the change**, **investigate the change**, and **implement the change**.

Execute a project / Report progress

7 Minutos

The PM job requires many hats. Not only do PMs motivate and lead their teams to success and plan and monitor the project, they must also report on the project progress.

A **project status report** is a document that describes the progress of a project within a specific time period and compares it against the project plan. Project managers use status reports to keep stakeholders informed of progress and monitor costs, risks, time, and work. The status report for a project will generally include the following:

- The work that's been completed
- The plan for what will follow
- The summary of the project budget and schedule
- A list of action items
- Any issues and risks, and what's being done about them

The true value of a project status report lies beyond its use as a communication channel. It also provides a documented history of the project. This gives PMs historical data, so the next time they are planning a similar project, they can avoid any missteps or bottlenecks.

Source: The Ultimate Guide to Project Status Reports (https://www.projectmanager.com/status-report), by ProjectManager.com.

PMs can use an online reporting tool or template from their organization. It's common for the PM to write and share out a report on a weekly basis throughout the project. It's also common to use color-coding in a project status report to easily visualize status.

Scenario: Wired Letters – Project Status Report

Natasha is using her organization's template for the project status report.

Take a couple of minutes now to open and study the report to see what the team has accomplished, what is coming up, and the color-coding she used for the milestone status.

(https://ibm.box.com/shared/static/6q3z06idle54qb81lgdv7eggai7e2hmr.pdf)

Project status report
(https://ibm.box.com/shared/static/6q3z06idle54qb81lgdv7eggai7e2hmr.pdf)

Reporting project schedule slips and cost over-runs is never pleasant. But, ignoring them and hoping that things will somehow correct themselves is a recipe for disaster. It's never comfortable to report bad news, but in the end it's much better to inform stakeholders as early as possible. For instance, it's much better to report three months before a project due date that the delivery is in jeopardy than it is to report two weeks before the due date!

> Early understanding of variances and professional reports from the PM gives the client and stakeholders time to consider, react, and adjust. Over time, this begins to build credibility and trust.

Execute a project / Wrap-up and mini quiz

7 Minutos

"A good plan today is better than a perfect plan tomorrow."

– George S. Patton, general in the United States Army

You should have a good understanding of the **Execute phase**. Remember this phase requires the most time, work, and cost. Its purpose is to implement, perform, manage, and control the work that is defined in the planning phase. While the team is executing their tasks to deliver the product or service, the PM is **juggling many tasks at the same time**, including:

- Managing the schedule, tasks, and cost
- Leading the project team and resources
- Encouraging teamwork and facilitating meetings
- Resolving conflicts and crises
- Managing reviews, approvals, and the quality of the deliverables
- Managing changes
- Reporting on progress

Interested in learning more?

Here are some curated online videos and resources to check out if you want to explore more about the topics you just learned about.

- **Management Styles: Which Type of Manager Are You? (https://youtu.be/REdrlauhOu8)**, a video by The Digital Project Manager
- **How to Successfully Execute a Plan (https://youtu.be/802yQd8TNf8)**, a video by ProjectManager.com
- **How to Monitor Daily Progress as a Project Manager (https://youtu.be/E2Qahnv1j1g)**, a video by ProjectManager.com
- **How to Create Highly Effective and High Performing Team (https://youtu.be/cJ8aia6PmWk)**, a video by OeLean
- **7 Secrets for Effective Team Communication (https://youtu.be/r3QOULEhypA)**, a video by ProjectManager.com
- **How to Make a Change Management Plan (https://youtu.be/wV1KlBpv24k)**, a video by ProjectManager.com
- **How To Build Project Status Reports + Template and Examples (https://thedigitalprojectmanager.com/project-status-report-guide/)**, a blog by Robyn Birkedal for The Digital Project Manager

Let’s wrap up with a mini quiz to check your understanding of the concepts presented.

*Select **I’ve checked it out!** to begin.*

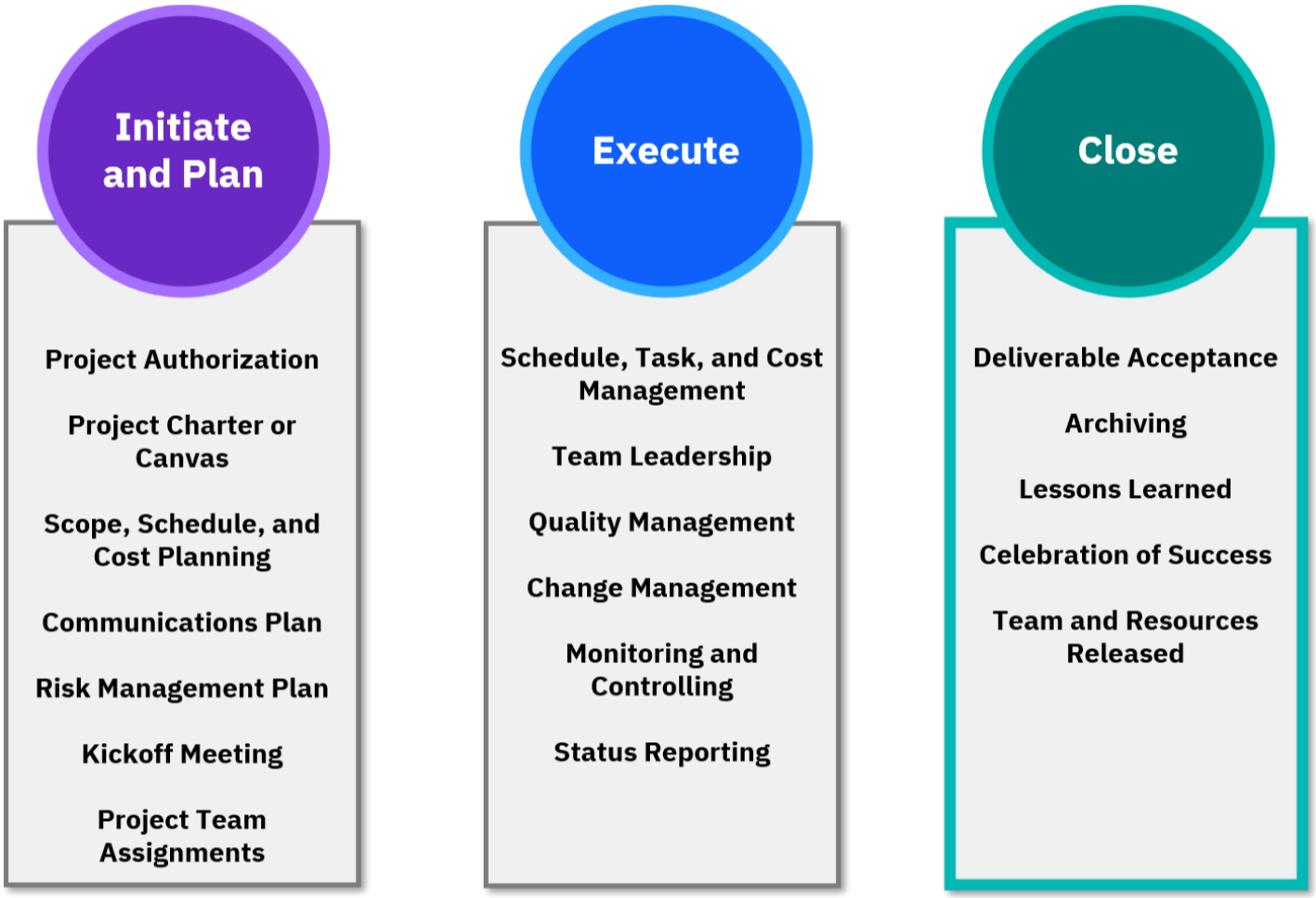
Close a project / Purpose

2 Minutos

Anyone who has worked in a project environment has probably experienced the phenomenon where certain projects just do not seem to have clean endings! The project team does not quite know what to do next. Maybe some continue to try to work on the project deliverables after they have been deployed, while others continue finishing up things they didn't quite get to, like documentation.

And the team cannot simply fade away either!

Let's examine the **Close phase**, the final phase of the traditional phases of project management.



Purpose: Once the project manager and project team have delivered the product or service to the client, it's time to understand that the project is finished, complete documentation, spend time reflecting on the experience, and celebrate success.

Closing might seem like a less important phase compared to the project planning phases. However, there is a lot of work involved once a project is technically complete. Closing activities are important not just for the current project, but for subsequent projects, and closing activities are often overlooked.

Project managers must start thinking about closing the project when it **starts**. On day one of a project, PMs should establish an awareness of, a process for, and a commitment to a successful project closing among everyone involved in the project.

*Start learning about this phase now. Select **I've checked it out!** and then select **Next**.*

Close a project / The project is completed, now what?

7 Minutos

It's important that the entire team understand that the project is finished. Project closing tasks must be a part of the project plan and budget, like other tasks. In the **Close phase**, the project manager conducts these final critical tasks.

Complete documentation and archive files

Everything needs attention, must be signed for, and then archived for the organization.

The PM must review all the project documentation and agreements for the project, such as the project charter and any contracts, to ensure that they are complete. The PM makes sure:

- A project summary is presented to the client, the deliverable is accepted, and client feedback is collected.
- All project objectives and commitments have been met.
- Any documents that require sign off are approved by the client and stakeholders.
- The financials are completed for the organization internally, and any external vendors or resources who were contracted with and need payment.
- Everything is archived.

Completing these items is not simply "housekeeping," but a process that is critical to providing good documentation for use in future projects.

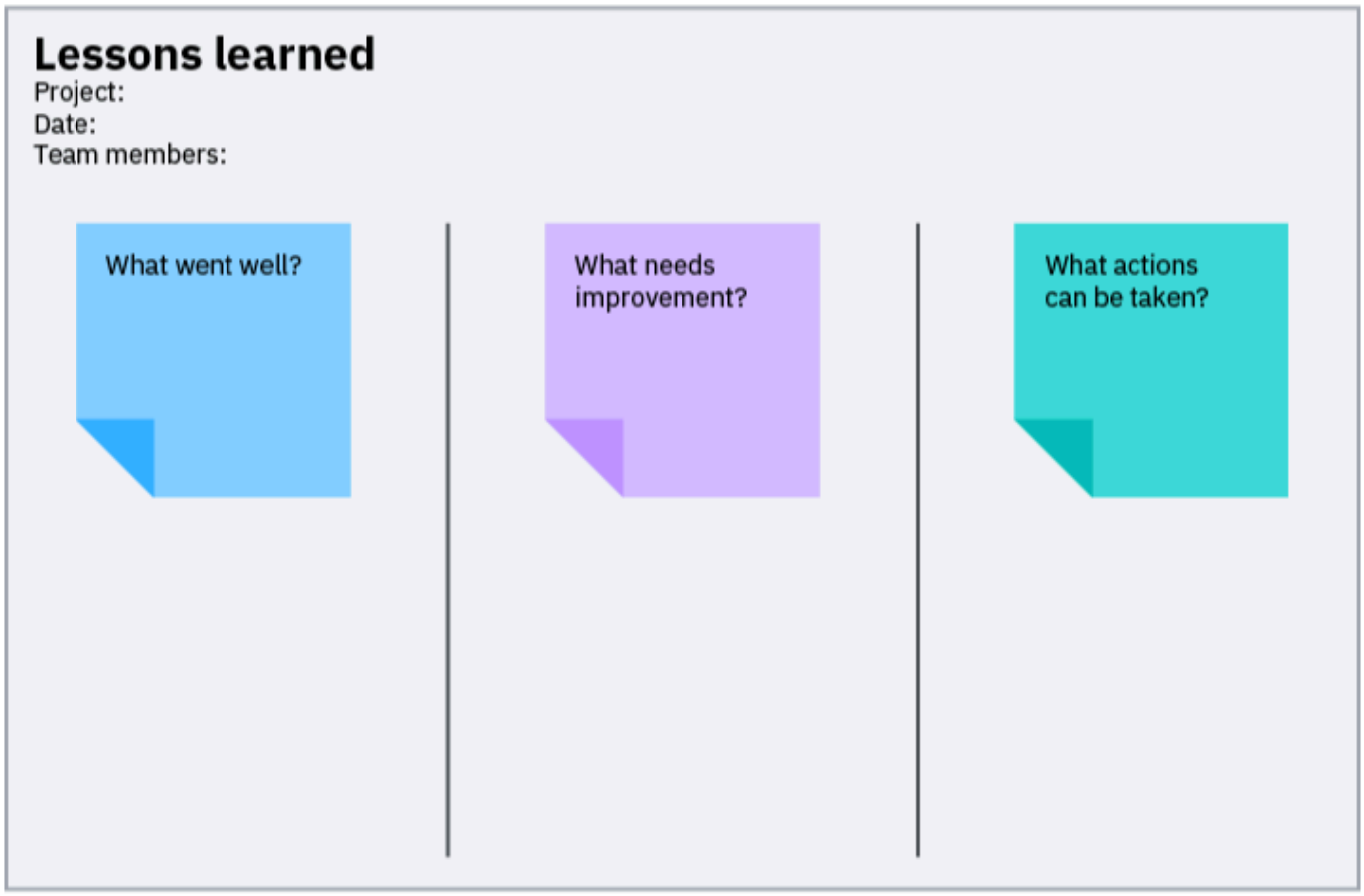
Conduct a lessons learned session with the project team

It's time to look back and reflect on the team's project experience.

The PM must gather the core project team members and host a meeting to collect and document what are called "lessons learned" from them. The purpose is to reflect on what happened in the project and identify actions for improvement going forward. The simple act of discussing together the things that **went well** and things that **could have been improved** imprints on each project team member things that they can take into their next projects. It can be beneficial to include internal stakeholders, such as the sponsor or client.

Here is a simple example of what an online lessons learned chart could be, showing the three categories for the team to individually contribute to:

- What went well?
- What needs improvement?
- What actions can be taken?



> **Note:** On an Agile project, the project team meets **regularly** to reflect on events and consider opportunities for improvements. It's a facilitated meeting with a set format and typically called a "retrospective" or "sprint retrospective."

It's important for the PM to encourage honesty and create a positive meeting space so the project team members feel free to share what they think will help them to improve. Contributions to lessons learned should not be taken personally. Every project team member should listen with an open mind because everyone's project experience is

valid. Think of this as a continuous learning and improvement opportunity.

Here are some example questions that the PM can ask to help the team think about lessons learned:

- Did we do a good job of planning the project? How close were we with our baselines and estimates?
- Did we involve the right stakeholders at the right time? How did we do with managing their expectations?
- How did we do with communications? Within the project team? Within our organization? With our sponsor or client? With key stakeholders? Did we use the right media for communications and the right frequency?
- Were there a lot of unknowns that we did not account for? Why? Why not?
- How well did we manage issues and risks on the project? Did we have procedures to do this? Did they work? How could they be better?
- Were we able to stay within budget?
- How much “scope creep” did we have? How well did we manage it?
- How can we improve our project meetings?

The PM should document, share out, and archive the lessons learned to be considered on **future** projects.

Celebrate success with the project team

Congratulations team! We did it!

Remember to acknowledge the team’s success on the project! The PM should plan some time and cost to celebrate with the team. The PM should recognize the team’s overall achievement and individual contributions. This celebration can be as formal or informal as feels right for the organization. It can even be virtual!

Release the project team resources

It’s time to move on to the next project.

The PM assembled the team for the project, and now the PM must release the project team. This is a crucial task because it frees up people to work on other projects.

> **Note:** This might also include releasing a technical environment if it was needed for the project as well as releasing external suppliers or resources.

Scenario: Wired Letters – Project Closing

Natasha and the team completed and launched the new **Virtual Tools for Collaboration** course! The client, Sam Green, is very pleased. The course is ready for Wired Letters to announce and invite all employees to take.

Sam and Natasha looked back on the goal of the project: To increase employee adoption of the agency's new virtual teaming tools across all business units to be 90% or greater for the 1,320 Wired Letters employees. Sam will monitor final assessment reports and course completion reports. He is confident the agency will achieve its goal.

And in the end, Natasha and the team delivered the course on time and within budget. **It's a project success!**

Natasha has "housekeeping" to do to close out the project, for instance:

- She makes sure the contract with Wired Letters is closed and archived.
- She saves her final planning documents, such as the project schedule, communications management plan, risk management plan, risk log, project status reports, and so on, so she and other project managers on her team have them for future reference.

Then, Natasha likes to facilitate a **combination** meeting in which her team and internal stakeholders first go over lessons learned with action items and then spend time celebrating the project together. The team had a virtual lunch party! Beforehand, Natasha collected a photograph of each person's hobby, favorite sports team, family, or pet to showcase in the online meeting so everyone could share a quick story about the photo. This made the virtual gathering much more personal and uplifting. The team was proud of their work!

From the series of project scenarios presented, you can see how talented PMs like Natasha follow their organizations' project management process, use templates, lead the project team to success, handle issues along the way, and bring their unique point of view to their projects!

Close a project / Wrap-up and mini quiz

3 Minutos

“It always seems impossible until it’s done.”

– Nelson Mandela, anti-apartheid revolutionary, political leader, philanthropist, and former president of South Africa

In conclusion, it’s important for the PM to plan ahead and carry out a series of activities to properly close a project and acknowledge the project team’s success.

Interested in learning more?

Here are some curated online videos and resources to check out if you want to explore more about the topics you just learned about:

- **How-to Project Closing (https://thedigitalprojectmanager.com/how-to-project-closing/)**, an online guide by The Digital Project Manager
- **Closing the Project (5 Steps to Project Closure) (https://youtu.be/Fl5BVFzigt8)**, a video by Adriana Girdler
- **The Most Complete Project Closure Process You’ll Ever Need (https://thedigitalprojectmanager.com/project-closure-best-practices/)**, a blog by Patrice Embry for The Digital Project Manager

Let’s wrap up with a mini quiz to check your understanding of the concepts presented.

*Select **I’ve checked it out!** to begin.*

You are the PM!

20 Minutos

The purpose of this lesson is to think about the project management concepts that you learned in this course and to apply them to a project scenario designed just for you. It’s time for you to be the PM!

Instructions

1. Read the following scenario setup.
2. Carefully study the project canvas.
3. Then, use your project management knowledge to respond to the situations you find yourself in as the PM!

Your project scenario

You work in the Human Resources (HR) department for **Tech Today & Future**, a company that offers comprehensive support for managed information technology (IT) and cybersecurity services to clients worldwide. You are nominated to be the project manager for a new, first-time workplace event called **Family Day**!

- It is a company-sponsored opportunity for all employees and their families to spend time together, and learn new things about technology, first aid, and safety.
- The request came directly from your General Manager, Julieta Azevedo Ferreira. You should consider her and the HR Director, Jane Patel, as your internal clients.
- Jane shared this will be an internally funded event by the HR department, and USD 10,000 is allocated for catering the food, beverages, and supplies for the event.
- It will take place in October at the local office building, both inside in some conference rooms and outside under some tents.
- Your team will be made up of volunteers from your HR group and other interested groups in HR, including Employee Relations and Benefits.
- Your objective is to successfully deliver a fun, informative, safe, healthy, and celebratory Family Day for all employees and their families.

PROJECT CANVAS

You are the project manager for this event, and you created the following project canvas to capture all the insights for this project.

Review your project canvas and refer to it during these situations.

Project Canvas: Family Day Event for Tech Today & Future

Goals
What is the purpose or objectives of the project?

- To bring the families of employees together to invite them to learn about technology, increase awareness about safety measures at work and at home, and celebrate being an employee of Tech Today & Future.

Users
Who is in the target audience who will benefit from the product or service?

- All Tech Today & Future employees.
- Immediate family members, including husbands, wives, sons, and daughters as well as mothers, fathers, significant others, and domestic partners.

User Benefits
What benefits can users expect when the project is finished?

The new, unique experience will:
- Build family and work relationships
- Increase pride in working for the company
- Promote employee engagement with the company

Team
Who are the participants? What is their role?

- **You**, Project Manager
- Antonia Sousa, Safety Specialist
- Daniel Huang, Employee Relations Specialist
- Robson White, Employee Relations Assistant
- Rajinder Anand, Benefits Administrator
- Julie Matthews, Benefits Expert

Stakeholders
Who affects the success of the project? What is their role?

- Adele Karman, General Manager
- Jane Patel, HR Director
- Dr. Peter Drew, Health and Safety Manager
- Sonya Bells, Employee Relations Manager
- Arthur Coyle, Benefits Manager

Scope
What is covered under the project?

- Opening ceremony
- Seminars about technology
- Health and safety lectures and demos
- Kids' entertainment
- Food and beverages

Deliverables
What are the outcomes, documents, and products that will be delivered to the client?

- Participation report
- Photographs, videos, and tweets of the signature moments from the event
- Survey results from attendees

Activities
What activities does the team need to execute to deliver the product or service?

SET THE AGENDA
- Conclude activities for the day
- Confirm speakers for seminars, lectures, and demos
- Assign volunteers to support activities

COORDINATE COMMUNICATIONS
- Leadership communications
- Employee invitation
- Social media

MANAGE CATERING
- Select menu for lunch and snacks from vendor

DETERMINE ALL LOGISTICS
- Reserve rooms (inside) and tents (outside)
- Obtain supplies (projector, flipchart, markers, chairs)

Milestones
What are the key events and dates that frame the schedule?

- 17 July: Kickoff meeting
- 20 August: Stakeholder Meeting
- 15 September: Stakeholder Meeting
- 01 October: Stakeholder Meeting
- 12 October: Family Day!
- 13 October: Stakeholder Meeting
- 15 October: Close project and celebrate

Note: On the kickoff meeting, the team concluded status meetings will be held weekly.

Risks
What are possible future events to consider now that could have a negative impact on the project?

- Registration location: It could be overcrowded to conduct check-in activities in the building lobby.
- Outside activities: They could be at risk due to the unknown weather for the day, such as rain or cold weather.

Download an accessible version of the graphic (https://ibm.box.com/shared/static/86hn97tz9q8splsj6eqozbrcy6rb6f2c.pptx)

Situation 1: Plan the project

You can start the planning process for this exciting event by creating a work breakdown structure (WBS) to identify all project activities and their tasks. You need to "break down" and further detail the noted **Activities** in the project canvas.

> Remember, at this time, the WBS activities and tasks are not organized into any kind of order.

*Drag each task on the right to the correct activity in the WBS on the left, then select **Check**. If needed, you can **Retry** as many times as you would like.*

1.1 Set the agenda
1.1.1 Confirm technology speakers
1.1.2 Confirm safety speakers

1.2 Coordinate communications
1.2.1 Draft event invitation
1.2.2 Email event invitation

1.3 Manage catering
1.3.1 Select beverages
1.3.2 Pick locations for trash cans

1.4 Determine all logistics
1.4.1 Order bracelets to give at check-in
1.4.2 Order tents, tables, and chairs

Determine hashtag for social med

Determine time slots for speaker

Assign volunteers to manage check

Sign contract with food vendor

Check

This is a sample and not a list of all tasks that you need to manage. It's definitely a good start!

Situation 2: Manage risks

You were keen to identify two potential risks in the project canvas. Now, you need to register them on the project's risk log. Here is your risk log:

Risk Log

ID	Risk description	Likelihood of the risk occurring	Impact if the risk occurs	Severity *A rating based on likelihood and impact*	Owner *The person who will manage the risk*	Mitigating action *Actions to mitigate the risk to reduce the likelihood*
1	**Registration location**: It could be overcrowded to conduct check-in activities in the building lobby.	Medium	High	High	You, Project Manager	?
2	**Outside activities**: They could be at risk due to the unknown weather for the day, such as rain or cold weather.	Low	High	Medium	You, Project Manager	?
3						
4						
5						

Download an accessible version of the graphic. (https://ibm.box.com/shared/static/j2yvluz33xpyk62hl64zbp3c6flej05z.pptx)

You must do your best to ensure the success of the event. Think about creative actions you and the team can take to mitigate the likelihood of the risks occurring. How would you fill out the last **Mitigating action** column?

*Answer the following two questions. Use the arrows to go to the next question. If needed, you can **Retry** as many times as you would like.*

Question 1: What would you choose as the best way to mitigate risk 1? Select your answer and then select **Check**.

- ○ Discontinue registration since there is no need to track the number of participants.
- ○ Have all attendees register outside, under a tent, in front of the main building.
- ○ Have only one centralized check-in station in the main building lobby to organize the attendees.
- ○ Have multiple check-in stations inside the main building to spread out the attendees.

Check

Situation 3: Track and update stakeholders

The project is underway and progressing! You and the team of volunteers have a schedule to follow, and everyone is being productive with their assigned tasks. Today is a big milestone! It is your first Stakeholder meeting. It is your opportunity to update stakeholders about project status, raise questions, and gain agreement on next steps

to take, if necessary. You know the project canvas and how things are going. Let's prepare.

*Answer the following three questions. Use the arrows to go to the next question. If needed, you can **Retry** as many times as you would like.*

Question 1: Who should you invite to the stakeholder meeting? Select all that apply and then select **Check**.

- [ ] Adele Karman, General Manager
- [ ] Jane Patel, HR Director
- [ ] Dr. Peter Drew, Health and Safety Manager
- [ ] Sonya Bells, Employee Relations Manager
- [ ] Arthur Coyle, Benefits Manager
- [ ] Rajinder Anand, Benefits Administrator

Check

Situation 4: Handle a change request

During the Execute phase of your project, your internal client Jane Patel, the HR Director, emails you to request something **new** for the event that she feels would make everyone happy. Sounds like a **project change request (PCR)**! Jane would like children 10 years old and under to receive a souvenir to take home. Remember, this project is funded internally by Jane's HR department and your team is made up of volunteers. How would you handle the change management process for this?

Writing an answer is a good way to process your thoughts. These answers are for your use only.

Documentation tool

- Enter your responses in the fields provided.
- Download your responses.

Enter your responses in the fields provided.

1. First, identify the change. Document who is requesting the change and why. Then, would you approve, reject, or defer the change request? *

2. Next, investigate the change. What do you estimate the impacts the change could bring to the project's scope, schedule, and budget? Is the change needed for the project to succeed? *

3. Finally, implement the change. Assuming it is approved, how would you implement the change on the project? *

Expand the following section to read about one way you could handle this project change request. Compare this approach to your notes.

Evaluate your thinking!

- **Identify the change:** It's clear that your internal client Jane Patel, the HR Director, is the requestor of the project change to give children 10 years old and under a souvenir during Family Day. It would make the children and families happy, so you decide to approve investigating this project change request (PCR).
- **Investigate the change:** Giving out souvenirs to kids will not make the event succeed or fail, but it certainly is an element of fun and surprise. You follow up with Jane to find out what souvenir she has in mind. She suggests looking at the company-branded gifts that are given out during new hire training. Jane is willing to allocate all available foam balls that say "Tech Today & Future" on them and order more. You determine there is no impact to your schedule or budget because Jane is offering to cover this cost. The scope of the project is intact.
- **Implement the change:** You confirm that both Jane and your General Manager, Julieta, approve the PCR. You communicate about the change to the team, and you assign a volunteer to coordinate the procurement and hand out the souvenir balls to the children at check-in on the day of the event.

Situation 5: Report final status

Family Day was a success! Tech Today & Future company executives, employees, and everyone's family had lots of fun, learned new things from the inspiring speakers, and enjoyed sharing food plus building a sense of community. The weather was lovely, and the check-in process went according to plan, so your identified risks did not impact the project. You successfully met your project goal!

> **Project goal:** To bring the families of employees together to invite them to learn about technology, increase awareness about safety measures at work and at home, and celebrate being an employee of Tech Today & Future.

It's time to close the project, so you have many critical activities to complete. You are writing the final status report for the entire team and stakeholders. Fill out the last section to capture the final communications and activities that you need to perform to close the project.

*Drag and drop the correct next steps to the **Activities Coming Up** section to complete the status report, then select **Check**. If needed, you can **Retry** as many times as you would like.*

Archive project files

Update scope

Create project canvas

Share photos and videos with stakeholders

Close contract with food vendor

Develop a new WBS

Facilitate lessons learned with team

Host project celebration party

Check

Excellent work! You got to try out being a PM!

The situations in this project scenario should help expand your knowledge about various project management processes. You got a taste of planning the project, managing risks that could occur, communicating with stakeholders, handling a change request, and closing out a project.

Job landscape

15 Minutos

Is project management in line with your career interests?

> Are you a good problem solver who enjoys varied responsibilities and juggling tasks?
>
> Can you be a good communicator and manage a team to accomplish a goal?
>
> Do you enjoy planning and consider yourself to be a detail-oriented person?

Then, the field of project management could be for you! It is a true adventure, and you will not be bored!

We live in an increasingly projectized world. Project managers are important contributors who can make a difference. They directly impact an organization's culture and morale and the bottom line. And, project management is a growing field at the forefront of innovation and change in the global business environment.

Consider factors like your personal interests and skill set if you're thinking about a career in project management.

What skills should a new project manager focus on?

Individuals new to project management should know that there are some essential knowledge, skills, and abilities that successful project managers need.

Overall, a project manager must be a good problem solver who communicates well and enjoys varied responsibilities and juggling tasks.

Remember the International Project Management Association (IPMA) competencies across the **Perspective**, **People**, and **Practice** domains so you know the recognized standards for personal traits for a successful project manager.

- Strategy
- Governance, structures and processes
- Compliance, standards and regulation
- Power and interest
- Culture and value

PEOPLE

- Self-reflection and self-management
- Personal integrity and reliability
- Personal communication
- Relations and engagement
- Leadership
- Teamwork
- Conflict and crisis
- Resourcefulness
- Negotiation
- Results orientation

PRACTICE

- Design
- Requirements and objectives
- Scope
- Time
- Organization and information
- Quality
- Finance
- Resources
- Procurement
- Plan and control
- Risk and opportunity
-

Stakeholders

- Change and transformation
- Select and balance

> **Note:** A new project manager might not have all these skills at first, but focusing on them over time will provide greater career path flexibility and the foundation for technical or business-focused leadership positions.

The job market

Organizations that embrace project management are seeing success. Organizations value an effective methodology to complete projects on time and within budget. They need talented professionals, so the demand for project managers is high!

Here are some quick and powerful statistics to consider.

There will be **22 million** new project management job openings through **2027**.

By 2027, employers will need nearly **88 million** individuals in project management-oriented roles.

China and India will represent more than **75%** of the total project management-oriented employment.

Source: Project Management Job Growth and Talent Gap 2017–2027, PMI (2017) (https://www.pmi.org/learning/careers/job-growth).

The future is bright!

In an environment of constant change and upheaval, successful organizations must be able to adapt and implement quickly, demanding more of project managers than ever before. After surveying almost 500 organizations across 57 countries, IPMA along with KPMG and the Australian Institute of Project Management (AIPM) reported that **74% of respondents think that, in the future, PM skills will be more important than today**.

Source: The future of project management: Global Outlook - Summary Report 2019, KPMG, AIPM, IPMA, October 2019 (https://home.kpmg/content/dam/kpmg/au/pdf/2019/future-of-project-management-global-outlook-2019-summary-report.pdf).

> Project managers are needed in a **variety of industries all over the world**, from the information technology (IT) field to other sectors such as business, finance, human resources, marketing, insurance, oil and gas, manufacturing, construction, and more!

Possible career progression

There are plenty of opportunities for advancement in the field of project management. It can be a life-long career in a variety of industries.

To successfully manage projects, you need sufficient experience. You could start your career as a **project management associate** and work your way up. Also, while a formal degree is not obligatory, it can bring you added value.

There are many different project management job titles, from entry-level to executive-level, available as you move forward on your career path in different business environments. In traditional project environments, which this course is focused on, the following roles are typically recognized:

- Project team member
- Project management associate
- Project manager
- Program manager (who manages multiple interconnected projects)
- Portfolio manager (who manages interconnected and independent projects and programs within an organization)

Understanding certifications

There are a lot of project management related certifications. Certifications exist in this industry to allow standards to be maintained with regards to skills, knowledge, and experience. Having a certification can increase the range of job roles available and be a good way to demonstrate levels of proficiency when applying for jobs.

Let's check out some of the common certifications that are available in this field. You can consider these certification opportunities when furthering your education and perhaps pursuing a PM career.

With each of these, there are eligibility requirements and then you must pass an exam to become certified.

> **Note:** Some of the following certifications are for project management professionals with years of experience. These are qualifications you could consider working towards in the years after you get a PM-related role. They are included here to highlight the progression pathway.

International Project Management Association (IPMA)

IPMA (https://www.ipma.world/) offers international certifications of project management competencies for managing projects in traditional (IPMA 4LC) and agile environments (IPMA Agile Leadership), as well as competencies of coaches, consultants, and trainers (ICB4CCT) in the field.

They are based on the competencies defined by experts and described in the **global standards (https://www.ipma.world/individuals/standard/)**, including the Individual Competence Baseline®, Individual Competence Baseline in an Agile World, and Individual Competence Baseline for Consultants, Coaches and Trainers.

Here are IPMA certifications for different places in a project management career and different levels of competence. There are varying prerequisites for each certification.

IPMA 4LC (https://www.ipma.world/individuals/certification/)

This includes four levels of competence certification:

- **Project Management Associate (Level D) (https://www.ipma.world/individuals/certification/certified-project-management-associate-level-d/)** is for individuals who do not have previous experience. It recognizes a candidate's knowledge regarding the IPMA Competence Elements (CEs) related to project management.
- **Project Manager (Level C) (https://www.ipma.world/individuals/certification/certified-project-manager-level-c/)** is for professionals in a leading role in projects of moderate complexity or assisting in complex projects.
- **Senior Project, Programme, and Portfolio Manager (Level B) (https://www.ipma.world/individuals/certification/certified-senior-project-manager-level-b/)** is for professionals with years of experience in managing complex projects, programs, and portfolios.
- **Project, Programme, and Portfolio Director (Level A) (https://www.ipma.world/individuals/certification/certified-projects-director-level-a/)** is for professionals with years of experience in managing very complex projects, programs, and portfolios, as well as those of strategic importance for the organizations.

IPMA Agile Leadership (https://www.ipma.world/individuals/certification-agile-leader/)

This is a certification of proven experience and competence for professional leaders who initiate and implement sustainable change.

IPMA CCT (https://www.ipma.world/individuals/consultants-coaches-and-trainers-certification/)

This is a certification of competence for individuals working in consulting, coaching, and training in project management.

Find out more about IPMA certifications. (https://www.ipma.world/individuals/certification/)

Find an IPMA Member Association (MA) in your country. (http://www.ipma.world/about-us/membership-associations/member-associations-ma/)

Project Management Institute (PMI)

PMI (https://www.pmi.org/) professional certifications are developed by practitioners for practitioners to showcase skills. They are based on project management standards and ongoing research to meet the real-world needs of organizations.

Here are PMI certifications for different places in a project management career and different methodologies. There are varying prerequisites for each certification.

Certified Associate in Project Management (CAPM®) (https://www.pmi.org/certifications/certified-associate-capm)

The CAPM demonstrates a candidate's understanding of the fundamental knowledge, terminology, and processes of effective project management. This is for candidates who would like to manage larger projects and gain more responsibility or add project management skills into their current role.

Project Management Professional (PMP®) (https://www.pmi.org/certifications/project-management-pmp)

This certification is recognized and demanded by organizations worldwide. The PMP validates the candidate’s competence to perform in the role of a project manager, leading and directing projects and teams.

PMI Scheduling Professional (PMI-SP®) (https://www.pmi.org/certifications/scheduling-sp)

This certification recognizes demonstrated knowledge and advanced experience in the specialized area of developing and maintaining project schedules. The candidate needs advanced knowledge and experience developing, managing, and maintaining project schedules.

Find out more about PMI certifications. (https://www.pmi.org/certifications)

Find a PMI local chapter in your country. (https://www.pmi.org/membership/chapters)

Association for Project Management (APM)

APM (https://www.apm.org.uk/) is the chartered body for the project profession and an IPMA Member Association. APM offers a range of qualifications in a progressive structure for career development, from courses offering the “fundamentals” of project management through to

“management” and “professional” levels of understanding, requiring more advanced learning and assessment.

The internationally-recognized qualifications include the following.

Project Fundamentals Qualification (PFQ) (https://www.apm.org.uk/qualifications-and-training/project-management-fundamentals/)

This is for those wishing to gain a broad understanding of the principles of the profession. No prior knowledge or experience is required for this qualification, which will offer the individual the knowledge to make a positive contribution to any project.

Project Management Qualification (PMQ) (https://www.apm.org.uk/qualifications-and-training/project-management-qualification/)

This is for those wishing to achieve a broad level of project management knowledge sufficient to participate in projects from individual assignments through to large capital projects. Applicants typically have some existing project management knowledge, and it is the ideal next step for anyone holding the APM PFQ qualification.

Project Professional Qualification (PPQ) (https://www.apm.org.uk/qualifications-and-training/project-professional-qualification-ppq/)

This assesses an applicant’s capability in delivering projects and is APM’s most comprehensive assessment of professional project management capability, covering the core and specific competencies required across all areas of project management.

Find out more about APM Qualifications. (https://www.apm.org.uk/qualifications-and-training/)

Find options to connect with the APM community. (https://www.apm.org.uk/community/)

CHECK THIS OUT!

There are additional, popular project management certifications. You might hear about them or want to explore them on your own. These include:

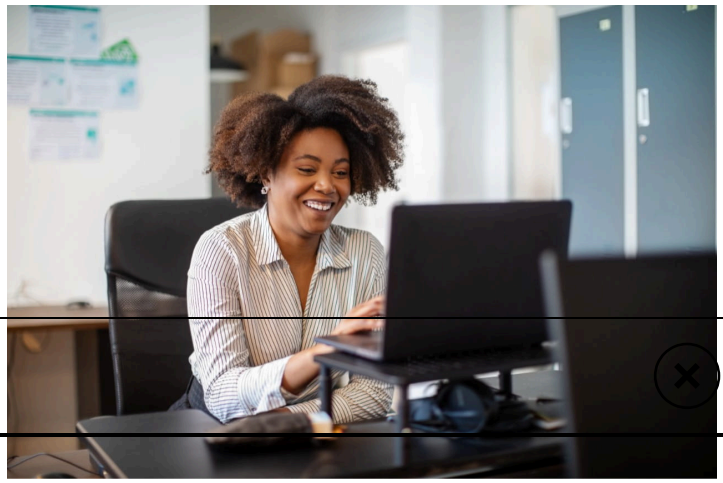
- **PRINCE2 Qualifications (https://www.prince2.com/usa/prince2-qualifications-explained)**
- **PM² Essentials Certification (https://www.pm2alliance.eu/pm2-essentials-certification/)**

Continue your learning

Maybe this is the beginning of your learning journey. Here are some resources you can check out, bookmark, and keep in mind if you’d like to explore more about project management and stay informed about the latest developments in the field.

This is a curated listing. There are a lot of organizations, websites, and courses out there to check out depending on your interests.

Expand each section to explore and bookmark the resources that interest you.



Find education in your own country

IPMA Education & Training Registration System (REG) (https://reg.ipma.world/) offers a network of quality courses and programs in project management and related fields.

Free online courses

- **edX (https://www.edx.org/)** offers a wide range of free, self-paced online **project management courses (https://www.edx.org/learn/project-management)** to help you build your skills. Learn about project management fundamentals and project management software tools.
- **Alison (https://alison.com/)** offers a variety of **project management courses (https://alison.com/courses/management/project-management)** you can explore to see what is right for your learning goals. Learn how to manage teams, set timelines, and drive projects to successful completion.
- **Oxford Home Study Centre (https://www.oxfordhomestudy.com/)** offers a free, online, self-paced **Project Management (Short Course) (https://www.oxfordhomestudy.com/courses/project-management-courses-online/free-online-courses-with-certificates-in-project-management)** that covers project management fundamentals, the role of a project manager, and the lifecycle of a project.

Note: These free offerings require you to sign up for an account or enroll.

Videos and blogs

- **Project Management Videos (https://www.youtube.com/playlist?list=PLF1064CD7B0A98261)** is a YouTube playlist offered by ProjectManager.com where you can find and choose from hundreds of short videos on all kinds of topics to learn about managing projects.
- **The Association for Project Management (APM) (https://www.apm.org.uk/)** has a **Project Management Topics (https://www.youtube.com/playlist?list=PLQzq_ylfBVzIglAvPtrostgYlMtYCvk28)** YouTube playlist of short, informative videos for beginners.
-

GoSkills Project Management Resources (https://www.goskills.com/Project-Management/Resources) offers short articles that cover a range of project management topics and trends.

- Stay in touch with the latest news and developments in the field with these blogs:
    - **IPMA blog (https://www.ipma.world/blog/)**
    - **PMI blog (https://community.pmi.org/blogs/722102/the-official-pmi-blog#_=_)**
    - **ProjectManager.com blog (https://www.projectmanager.com/blog)**
    - **Project Management Basics blog (https://pmbasics101.com/blog/)**
    - **A Girl's Guide to Project Management blog (https://www.girlsguidetopm.com/blog/)**

Explore opportunities!

If you are seeking employment, you can start exploring the job marketplace. Check out job postings to familiarize yourself with common skills and qualifications for entry-level positions. Get a sense for jobs that might appeal to you in the future, and work to meet the qualifications.

Show what you know

15 Minutos

Quick summary

This course introduced you to the basic principles of project management and what it takes to be a successful project manager. You learned about:

- Common project management terms
- The value of project management
- Different project management approaches, including Waterfall, Agile, and Hybrid
- The role, overall responsibilities, and competencies of a project manager
- The purpose and key project manager tasks across the Initiate and Plan, Execute, and Close phases of a project
- The overall job market and common industry certifications

And, you put your project manager "hat" on to work through a project scenario.

> You can see that project managers use a variety of processes, plans, and techniques and their personal skills and talent to lead project teams to successfully deliver the project for their client.

Final quiz

So, how much do you know about project management fundamentals and the role of the project manager?

Let's check your knowledge in a final quiz of **10 questions**. You must achieve a score of **80% or higher** to pass the quiz. Don't worry! If you aren't successful at first, you can retake the quiz as many times as needed to pass.

*Click **Let's Play!** to show what you know and complete this course.*

Earn your badge

Once you complete all the topics in this course and pass the final quiz, you'll see completion check marks beside all of the topic names in the side navigation. Then you're eligible to earn the **Project Management Fundamentals** badge!

Please allow a few business days for processing. You'll receive an email to claim the badge online.