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A Framework for Strategizing and
Defining Project Objectives
and Deliverables

DIETMAR W. SOKOWSKI

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Dietmar W. Sokowski

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To my family and my friends

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Contents

	Preface	xiv
Section I	The Initiating of Projects	1
Chapter 1	Fundamentals	3
	Learning Objectives	3
	The Four Sections of This Book.	4
	Glossary	5
	Overview	7
	The Holistic Viewpoint of Project Integration and Scope Management	11
	The PMBOK® View of Project Integration and Scope Management	18
	The IPO Concept and How Project Management Might Have Started	26
	The Similarity and Difference Between the PMBOK® and the Holistic View	31
	Some Fundamental Terms and Concepts	35
	Two Enterprise Elements That Influence Project Management	45
	Summary	48
	Review Questions	49
Chapter 2	The Project Charter.	51
	Learning Objectives	51
	Overview	52
	Project Charter—The Single Point of Reference (SPOR) for the Project	57
	Inputs to and Activity Tasks for Writing a Project Charter	93
	The Output: The Project Charter	109
	A Charter Case in Point	110
	Summary	112
	Review Questions	113

Section II The Planning, Defining, Scoping, and Structuring of Projects115

Chapter 3 Project Management Plans and Documents.....117

Learning Objectives	117
Overview	118
Project Management Planning.....	122
The Project Management Master Plan	128
The Change Management Plan	131
The Communications Management Plan	133
The Configuration Management Plan	135
The Cost Baseline.....	137
The Cost Management Plan.....	138
The Human Resource Management Plan.....	140
The Process Improvement Plan.....	141
The Procurement Management Plan.....	142
The Quality Management Plan	144
The Requirements Management Plan.....	145
The Risk Management Plan	146
The Schedule Baseline	147
The Schedule Management Plan.....	148
The Scope Baseline.....	149
The Scope Management Plan	150
The Stakeholder Management Plan.....	151
Additional Project Management Documentation	152
Summary	154
Review Questions	154

Chapter 4 Project Requirements155

Learning Objectives	155
Overview	156
Understanding Requirements	161
Requirement Classification and Traceability.....	179
Collecting and Documenting Requirements.....	181
Summary	184
Review Questions	185

Chapter 5 The Scoping of Projects.....187

Learning Objectives	187
Overview	187
The PMBOK® Process Define Scope	188

	The Holistic View of the Scoping of Projects	189
	Summary	191
	Review Questions	191
Chapter 6	The Project Work Breakdown Structure (WBS).	193
	Learning Objectives	193
	Overview	193
	The PMBOK® Process Create WBS	196
	The Making of a Work (or Scope) Breakdown Structure (WBS or SBS)	199
	A WBS Case in Point	204
	Summary	206
	Review Questions	206
Section III	The Managing and Leading of the Execution of Projects.	207
Chapter 7	The Directing and Managing of the Work Performed in Projects	209
	Learning Objectives	209
	Overview	210
	The PMBOK® Process Direct and Manage Project Work	213
	The Holistic View of Directing and Managing the Work Performed in Projects.	215
	Tools and Techniques	219
	Aspects of Managing and Leading the Execution of Projects	223
	From and For Practical Project Cases	226
	Summary	230
	Review Questions	230
Chapter 8	The Monitoring and Controlling of the Work Performed in Projects	231
	Learning Objectives	231
	Overview	232
	The PMBOK® View of Monitoring and Controlling Project Work	232
	The Holistic View of Monitoring and Controlling Project Work	234
	From and for Practical Project Cases	238
	Summary	242
	Review Questions	242

Chapter 9	The Integrating and Controlling of the Changes Occurring in Projects.	243
	Learning Objectives	243
	Overview	244
	The PMBOK® Process Perform Integrated Change Control.	244
	The Holistic View of Integrating and Controlling the Changes Occurring in Projects.	246
	From and for Practical Project Cases	250
	Summary	258
	Review Questions	258
Chapter 10	The Controlling and Validating of the Scope of Projects	259
	Learning Objectives	259
	Overview	259
	The PMBOK® Processes to Validate and Control Scope	260
	The Holistic View of the Controlling and Validating of the Scope of Projects	262
	From and for Practical Project Cases	266
	Summary	271
	Review Questions	271
Section IV	The Closing of Projects	273
Chapter 11	The Closing of a Project or of a Phase	275
	Learning Objectives	275
	Overview	276
	The PMBOK® Process Close Project or Phase	276
	The Holistic View of the Closing of a Project or a Phase	278
	The Project Closure Acceptance Documentation (PCAD)	280
	Summary	285
	Review Questions	285
	Bibliography.	287
	Index.	289

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My thanks also go to the editors at Pearson Education for the guidance and service they provided. For the readers of this book, I have the request to please view the book with a critical mind and send me (hopefully many) comments. As my motto states, “as long as I breathe, I learn.”

I want to thank all my friends, my sister Jutta, my brother-in-law Conrad, as well as my former colleague and friend Harald for being friends. I especially thank my American brother and sister by choice of heart, Sten and Robin, for showing that lifelong friendship is possible.

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—**Dietmar W. Sokowski**

About the Author

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Preface: The Organization and Content of This Book

This book is organized into four sections.

Section I, “The Initiating of Projects,” sets the stage. Chapter 1, “Fundamentals,” introduces the holistic viewpoint of integration and scope management, the related PMBOK® Knowledge Areas and Process Groups, the IPO concept, and some fundamental terms and concepts, including the Pyramid of Business Maxims. Chapter 2, “The Project Charter,” defines and describes the single point of reference (SPOR) Project Charter, the document that formally authorizes a project.

Section II, “The Planning, Defining, Scoping, and Structuring of Projects,” focuses on the core elements of a project. Chapter 3, “Project Management Plans and Documents,” defines and describes the project management plan, subsidiary plans, and other project documents. Chapter 4, “Project Requirements,” focuses on the project requirements, how they are solicited, formalized, documented with the stakeholders, and accepted by the stakeholders. Chapter 5, “The Scoping of Projects,” focuses on detailing scope elements within the bounds defined in the SPOR Project Charter. Chapter 6, “The Project Work Breakdown Structure (WBS),” focuses on the work breakdown structure, the unambiguous documentation of *what* is within the defined and accepted project scope—that is, *what* must be delivered by the successful project.

Section III, “The Managing and Leading of the Execution of Projects,” focuses on directing, managing, monitoring, and controlling the actual project work, the inevitable changes, and controlling and validating the project scope. Chapter 7, “The Directing and Managing of the Work Performed in Projects,” is dedicated to the directing and managing of the work performed in projects, while Chapter 8, “The Monitoring and Controlling of the Work Performed in Projects,” concentrates on the monitoring and controlling of the work performed in projects. Chapter 9, “The Integrating and Controlling of the Changes Occurring in Projects,” addresses the integrating and controlling of changes occurring in projects, and Chapter 10, “The

Controlling and Validating of the Scope of Projects,” focuses on the controlling and validating of the project scope.

Section IV, “The Closing of Projects,” addresses two highly important, but often neglected elements in the life of a project, the project closure acceptance documentation (PCAD) and on lessons learned. These elements are covered in Chapter 11, “The Closing of a Project or a Phase.”

Key Themes That Characterize This Book

Over time, a plethora of books on project management became available. Some books emphasize particular techniques or software tools, often, without deliberate intention, creating the hope in the reader to find the silver bullet. Other books elaborate on the history of project management, or the latest trend in academic project management research.

One book that stands out and has become a de facto standard in project management is the Project Management Institute’s (PMI) *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*. At first contact with the *PMBOK® Guide*, the perceived dichotomy of Knowledge Areas and Process Groups has created some degree of misunderstanding and confusion among practitioners and particularly students. Without additional help, the exceptional usefulness of the *PMBOK® Guide* becomes evident only after extensive, and sometimes testing, experience with the *PMBOK® Guide* in managing projects.

Mastering Project Management Integration and Scope aims to provide such help. It introduces the holistic viewpoint of project management, which to a large extent parallels the *PMBOK® Guide*, but differs in that it avoids the interface issue of the Integration Knowledge Area with the Scope Knowledge Area by providing a new definition of the project scope management activity.

What This Book Is Not

Mastering Project Management Integration and Scope is not a book on the history and growth of project management methodologies or techniques. It is also not a book that elaborates on the importance of

project management in general or for an organization, nor is it a book that teaches in detail various techniques useful for the management of projects.

The book emphasizes a critical-thinking approach to integration and scope management to develop a conceptual understanding of the principles of project management with the intent of widening the domain of people who truly understand what constitutes project management.

Assumption

The readers are assumed to have a fundamental understanding of the different forms of organizational structure that can exist in commercial companies and in government agencies. The detailed knowledge conveyed in courses or textbooks on Organizational Behavior and Managerial Accounting is not required to get the maximum benefit out of *Mastering Project Management Integration and Scope*, but some familiarity with the topics from these courses or books will be helpful. Within the life span of a project, a project manager will be confronted with issues of cost, risk, human behavior, planning, change in midstream, and similar aspects of business life. The aim of this book is to prepare the project manager to successfully handle such challenges—not by being exposed to numerical examples, but by becoming aware of the underlying principles and factors of influence.

This Book's Audience

This book has been written for an audience that encompasses the entire spectrum of people exposed to and working with project management: the people who teach project management, the people who want to learn about project management, and the people who practice project management.

Instructors

The topic-oriented organization of the book enables instructors to use this book as the sole textbook or in conjunction with the *PMBOK® Guide* or even another textbook.

Student Community

Students will benefit from the topic-oriented organization of the book as this classification makes it easier to grasp the meaning, purpose, and influence of each topic on the management of projects—just like the object-oriented paradigm greatly improved the development, quality, and maintainability of software programs.

Practitioners

For practitioners, the topic-oriented organization of the book makes it a practical and easy-to-use reference book in their daily work whenever they want to be reminded of the fundamental principles.

All Readers

Whatever the audience, I hope that the book will provide sound insight into the subject of integration and scope management and that the book succeeds in illuminating the *PMBOK® Guide*'s comprehensive coverage of project management knowledge areas and the processes involved in managing projects.

Finally, I hope that the book will inspire the readers to join me in stating “everything in life is a project and I love making projects successful.”

This Book's Two Distinctive Features

(1) The chapters are consistently organized into three pedagogical blocks: the alpha [α]-block, which takes the reader from his or her current point of understanding to the second block, the main topic of the chapter, and the omega [ω]-block, which relates the main topic to actual project reality and allows the readers to confirm and reinforce the knowledge and understanding gained from the chapter. Thus, each chapter presents a closed learning block, from beginning to end, of one main topic.

(2) The use of the seven magnificent relative pronouns, referred to as the 7-Ws ever since Joachim Georg Darjes's (1714–1791) Latin terms had been translated into German. (In English, there are six corresponding Ws and one *H*).

A subsequent feature of the book that provides for ease of reading for the student and the practitioner and helps the instructor in delivering a comprehensible course is the consistency in structure throughout all chapters. The repetitive nature of the structure helps to reinforce concepts, deepen understanding, and strengthen retention.

Chapter 1 contains a glossary of new terms at the beginning of the chapter. In addition to being listed in the glossary of new terms at the beginning of Chapter 1, **key terms** are highlighted in bold at first occurrence in the text of Chapter 1. Where considered helpful and practical, a “case in point” is provided at the end of some chapters.

As is customary, the Bibliography gives credit to the sources of original thought, description, or illustration and might serve as suggestions for further reading.

Study Techniques

Notwithstanding individual differences in human nature, the keys to successful learning are concentration, persistence, and stamina. Multitasking doesn’t work at a quality level in the human brain and, as we are sometimes painfully reminded, not even well in computers.

One successful approach to studying is to first reflect on what the chapter (section) is about; then, after each paragraph, stop and explain to yourself what the paragraph “told” you. Some people use index cards to write down that message; others, like myself, use mind mapping to extract key ideas, important terms, and the like. The key question to ask yourself is always the “What” question. What was the main concept, statement, or logic of this paragraph or this chapter? Finally, explain or teach to a (virtual) listener or to yourself the essence of the chapter.

Index

Numbers

- 7-Ws, 98-100, 127
- 100 percent rule, 199-200
- 2014 Pulse of the Profession
In-Depth Report: Requirements
Management—A Core
Competency for Project and
Program Success, 162

A

- activities, 8
- activity area, 5
- activity based costing, 5
- activity task, 5
- agreements, Develop Project
Charter, 102-103
- approved change requests, 228
- artifacts, work performance data
collection, 216
- assumptions, Project Charter,
83-84

B

- baselining, 5
- Biggerplate, 204
- boundaries, Project Charter,
84-85
- bounds of Project Charter, 83
 - boundaries, 84-85
 - constraints, 85
 - issues, 85-86
 - project assumptions, 83-84
 - risks, 86-87

- brain dominance model, 120
- breakdown structures, 204
 - WBS (work breakdown
structure). *See* WBS (work
breakdown structure)
- budget-related administration,
PCAD (Project Closure
Acceptance Documentation),
281
- budgets, Project Charter, 72
- business case
 - Develop Project Charter, 103
 - Project Charter, 64-65

C

- case study, Project Charter,
110-112
- categorizing requirements,
179-180
- change, incorporating in
requirements, 175
- change management plans,
131-132
- change requests, 251
 - evaluating, 265
 - scope of projects, 265
- closing projects
 - Close project or Phase, 276-278
 - holistic viewpoints, 278-279
 - overview, 276
 - PCAD (Project Closure
Acceptance Documentation).
See PCAD (Project Closure
Acceptance Documentation)

- collecting requirements, 181-183
- communication
 - comprehensive open
 - communication, 176-178
 - project managers, 77
 - directing and managing projects*, 224
 - reports and presentations, 225
 - verbal interactions, 225
- communications management experts (SMEs), 134
- communications management plans, 133-134
- completion step, Project Charter, 101-102
- component types, WBS (work breakdown structure), 200
- components, WBS (work breakdown structure), 200-201
- comprehensive open
 - communication, 176-178
- Conduct Procurements, change requests, 251
- configuration management plans, 135-136
- constraints, Project Charter, 85
- contract closure, PCAD (Project Closure Acceptance Documentation), 281
- control accounts, WBS (work breakdown structure), 201
- Control Communications, change requests, 251
- Control Costs, change requests, 251
- Control Procurements, change requests, 251
- Control Quality, change requests, 251
- Control Risks, change requests, 251
- Control Schedule, change requests, 251
- Control Scope, 260-262
 - change requests, 251

- Control Stakeholder Engagement, change requests, 251
- core requirements, 170-172
- core values, 5, 45
- cost baselines, 137-138
- cost forecasts, 239
- cost management plans, 138-140
- Create WBS, 196-199
- critical success factors (CSFs), 73
- critical thinking, stakeholders, 178
- cross-Knowledge Area groups, 29
- CSFs (critical success factors), Project Charter, 73
- Cur, 98

D

- Daries, Joachim Georg, 98
- databases, storing links, 181
- decision trees, resultant requirements, 174
- Define Scope process, 188-189
- deliverables
 - PCAD (Project Closure Acceptance Documentation), 281
 - Project Charter, 74
- deliverables acceptance criteria, Project Charter, 73
- dependencies, Project Charter, 88
- Deutsches Institut für Normung (DIN), 39
- Develop Project Charter, 94
 - agreements, 102-103
 - business case, 103
 - Enterprise Environmental Factors, 104
 - expert judgment, 105
 - facilitation techniques, 105-106
 - Organizational Process Assets, 106-107
 - SOW (statement of work), 108-109
- Develop Project Management Plan, 228
 - project management plans, 228, 251

developing Project Charter, 96-97
 DIN (Deutsches Institut für Normung), 39
 Direct and Manage Project Work, 213-215
 change requests, 251
 directing and managing projects, 210-213
 examples, 226-230
 holistic viewpoints, 215-219
 leadership, 223-226
 project management assets, 217-218
 tools and techniques, 219-222
 documentation, 92, 122-123
 lessons learned documentation, 281
 original project documentation, 281
 PCAD (Project Closure Acceptance Documentation). *See* PCAD (Project Closure Acceptance Documentation)
 Project Charter, 92-93
 project management planning, 152
 documenting requirements, 181-183
 domain, 11, 157
 dynamic system, 5

E

elements
 of lessons learned, PCAD (Project Closure Acceptance Documentation), 282-284
 of PCAD, 281-282
 WBS (work breakdown structure), 201
 emotions, 176-177
 enterprise elements, 45-46
 Enterprise Environmental Factors, 46
 Organizational Process Assets, 46

Enterprise Environmental Factors, 46, 240
 Develop Project Charter, 104
 evaluating change requests, 265
 executive summary, Project Charter, 61-63
 expert judgment, Develop Project Charter, 105

F

facilitation techniques, Develop Project Charter, 105-106
 failure, defined, 163
 Fayol, Jules Henri, 38
 formal acceptance of deliverables
 documents, PCAD (Project Closure Acceptance Documentation), 281
 four-brain concept, 120-121

G

Gantt, Henry Laurence, 38, 58
 generic hierarchical format, WBS (work breakdown structure), 203
 goals, 5, 42-43, 69
 Project Charter, 66-72, 75-76

H

Herrmann, Ned, 120
 Hierarchical
 Input-Process-Output. *See* HIPO (Hierarchical Input-Process-Output)
 high-level information, 99
 HIPO (Hierarchical Input-Process-Output), 5, 34-35
 holistic structure, 6, 10, 14-16
 holistic view, versus PMBOK, 31-35
 holistic viewpoints
 closing projects, 278-279
 directing and managing projects, 215-219

- integrating and controlling changes, 246-249
- monitoring and controlling, project work, 234-238
- project integration and scope management, 11-14
- scope of projects, 189-191
 - controlling and validating*, 262-266
- stakeholders, 178

How, 99

Hughes, Liam, 204

human resource management plans, 140-141

human resource requirements, Project Charter, 76-77

I

incomplete, but accepted, performance, 163

initiating tasks, 55-56

Input-Process-Output. *See* IPO (Input-Process-Output)

inputs

- directing and managing projects, 226

- integrating and controlling changes, 251, 254

- Project Charter, 93-97

- scope of projects, 266, 268

integrating and controlling changes

- examples, 250-257

- holistic viewpoints, 246-249

- inputs, 251, 254

- outputs, 255

- overview, 244

- Perform Integrated change control, 244-246

- tools and techniques, 257

integration, 6, 9

integration and scope management, 8, 10

- holistic viewpoints, 11-14

interfaces, Project Charter, 77-78

interrogatives, 99

IPO (Input-Process-Output), 6, 26-31

- Control Scope, 263

- Project Charter, 97

issues, Project Charter, 85-86

issues log, 224

J-K

job role, 90

key project documents, 122-123

Knowledge Areas, 6, 18, 22-23

- processes, 22-24

- Project Integration Management Knowledge Area, 236

knowledge transfer sessions, 169

L

leadership, 35-36

- directing and managing projects, 223-226

lessons learned documentation, PCAD (Project Closure Acceptance Documentation), 281

lessons learned elements, PCAD (Project Closure Acceptance Documentation), 282-284

lessons learned questions, PCAD (Project Closure Acceptance Documentation), 284-285

levels, WBS (work breakdown structure), 201

links, storing in databases, 181

M

Manage Project Team, change requests, 251

Manage Stakeholder Engagement, change requests, 251

management approaches, Project Charter, 88-89

Mars Climate Orbiter, 167

matrix structure, 37

- mind maps, 229, 239
- mission statements, 6, 42, 65
- Monitor and Control Project Work, 232
 - change requests, 251
 - work performance report, 251
- monitoring and controlling
 - project work, holistic viewpoints, 234-238
 - projects, examples, 238-242

N-O

- nonlinear project progress, 237
 - Project Charter, 78
- objectives, 6, 43-44, 69
 - Project Charter, 66-72, 79
- organizational impacts, Project Charter, 79-80
- Organizational Process Assets, 46, 240
 - Develop Project Charter, 106-107
 - PCAD (Project Closure Acceptance Documentation), 281
- organizations, 6, 36-37
- original project documentation, PCAD (Project Closure Acceptance Documentation), 281
- outcomes, Project Charter, 74
- outputs
 - directing and managing projects, 227
 - integrating and controlling changes, 255
 - scope of projects, 269
- owner, 6

P

- PCAD (Project Closure Acceptance Documentation), 280

- elements of, 281-282
- lessons learned elements, 282-284
- lessons learned questions, 284-285
- PDSS (planning, defining, scoping, and structuring), 32
- PER (Project evaluation report), 281-282
- Perform Integrated Change Control, 228
 - approved change requests, 228
 - change requests, 251
- Perform integrated change control, 244-246
- Perform Quality Assurance, change requests, 251
- performance
 - failure, defined, 163
 - incomplete, but accepted, defined, 163
 - success, defined, 163
- phases, closing, 278-279
- Plan Procurements Management, change requests, 251
- plan scope management, 125
- planning, defining, scoping, and structuring. *See* PDSS (planning, defining, scoping, and structuring)
- PMBOK (Project Management Body of Knowledge), 6, 9, 127
 - Close project, 276-278
 - Create WBS, 196-199
 - Direct and Manage Project Work, 213-215
 - versus holistic view, 31-35
 - Perform integrated change control, 244-246
 - work performed in projects, monitoring and controlling, 232-234
- PMBOK Guide*, 30-31
- PMI (Project Management Institute), 9, 38, 52

post mortem review meeting,
PCAD (Project Closure
Acceptance Documentation),
282

presentations, communication,
225

primary stakeholder requirements,
Project Charter, 80

Process Groups, 6, 18-21, 29

process improvement plans,
141-142

processes, Knowledge Areas,
22-24

procurement management plans,
142-144

progress, nonlinear project
progress, 237

project, defined, 8-9

project assumptions, Project
Charter, 83-84

project background, Project
Charter, 63-64

project budgets, 72

Project Charter, 6, 10, 280

7-Ws, 98-100

bounds of, 83

boundaries, 84-85

constraints, 85

issues, 85-86

project assumptions, 83-84

risks, 86-87

budgets, 72

case study, 110-112

completion step, 101-102

CSFs (critical success factors),
73

deliverables acceptance criteria,
73

deliverables and outcomes, 74

Develop Project Charter, 94

agreements, 102-103

business case, 103

*Enterprise Environmental
Factors*, 104

expert judgment, 105

facilitation techniques,
105-106

*Organizational Process
Assets*, 106-107

SOW (statement of work),
108-109

developing, 96-97

documentation, 92-93

examples, 109

goals, 75-76

human resource requirements,
76-77

inputs, 95-96

interfaces, 77-78

nonhuman resource
requirements, 78

objectives, 79

organizational impacts, 79-80

overview, 52-57

primary stakeholder
requirements, 80

quality expectations and
standards, 81

reasons for, 63

business case, 64-65

project background, 63-64

requirements, 81

schedules, 81-83

scope of projects, 65-66

goals, objectives, and scope,
66-72

Socratic method, 100-101

SPOR (single point of
reference), 57-61

executive summary, 61-63

structure

dependencies, 88

management approaches,
88-89

project managers, 90

stakeholders, 91

team organization, 91-92

**Project Closure Acceptance
Documentation. See PCAD
(Project Closure Acceptance
Documentation)**

- project documentation, 122-123
 - PCAD (Project Closure Acceptance Documentation), 282
- project evaluation report (PER), PCAD (Project Closure Acceptance Documentation), 281-282
- project execution starting, 217
- project failures, 161-166
- project goals, Project Charter, 75-76
- Project Integration Knowledge Area, 18-19
- Project Integration Management Knowledge Area, 236
- project issues, Project Charter, 85-86
- project life, 6, 29
- project management, 6, 58-59
 - defined, 8, 38-39
- project management assets,
 - directing and managing projects, 217-218
- Project Management Body of Knowledge. *See* PMBOK
- Project Management for the 21st Century, 68
- project management framework,
 - integrating and controlling changes, 248
- Project Management Institute. *See* PMI (Project Management Institute)
- Project Management Library, 106-107
- project management master plan, 128-131
- project management planning, 122-128
 - change management plans, 131-132
 - communications management plans, 133-134
 - configuration management plans, 135-136
 - cost baselines, 137-138
 - cost management plans, 138-140
 - human resource management plans, 140-141
 - process improvement plans, 141-142
 - procurement management plans, 142-144
 - project management master plan, 128-131
 - quality management plans, 144-145
 - requirements management plans, 145-146
 - risk management plans, 146-147
 - schedule baselines, 147-148
 - schedule management plans, 148-149
 - scope baselines, 149
 - scope management plans, 150
 - stakeholder management plans, 151
- project management plans, 228, 239, 251
- project managers, 6
 - communication, 77
 - directing and managing projects*, 224
 - Project Charter, 90
- project objectives, Project Charter, 79
- project requirements, 156-160
- project risks, Project Charter, 86-87
- project scope, 69. *See also* scope of projects
- Project Scope Management Activity, 15, 20-21
- project success, comprehensive open communication, 176-178
- project terms
 - defining, 166-167
 - understanding, 167-169
- project work, monitoring and controlling, holistic viewpoints, 234-238
- projects, defined, 37-38

project-specific infrastructure administration, PCAD (Project Closure Acceptance Documentation), 282
Pyramid of Business Maxims, 40

Q

quality, Project Charter, 81
quality management plans, 144-145
Quando, 98
Quid, 98
Quis, 98
Quomodo, 98

R

reasons for Project Charter, 63
 business case, 64-65
 project background, 63-64
reports, communication, 225
requirements
 categorizing, 179-180
 collecting and documenting, 181-183
 core requirements, 170-172
 incorporating changes, 175
 Project Charter, 81
 project failures, 161-166
 project requirements. *See* project requirements
 project terms
 defining, 166-167
 understanding, 167-169
 of requirements, 183
 resultant requirements, 172-173
 RTMs (requirements traceability matrices), 180-181
 stakeholder holistic and critical thinking, 178
requirements management plans, 145-146
resultant requirements, 172-173
 decision trees, 174
risk management plans, 146-147

risks, Project Charter, 86-87
RTMs (requirements traceability matrices), 180-181

S

Safety Halt button, 218
SBS (scope breakdown structure), 199
schedule baselines, 147-148
schedule forecasts, 239
Schedule Management Plan, 127
schedule management plans, 148-149
schedules, Project Charter, 81-83
scope baselines, 149
scope creep, 7, 39
 controlling, 265-266
Scope Management Knowledge Area, 22
scope management plans, 150
scope of projects, 7, 187-188
 Control Scope, 260-262
 defined, 188-189
 examples, 266-270
 holistic viewpoints, 189-191
 controlling and validating, 262-266
 inputs, 268
 outputs, 269
 overview, 259-260
 Project Charter, 65-66
 goals, objectives, and scope, 66-72
 tools and techniques, 270
 Validate Scope, 260-262
security, PCAD (Project Closure Acceptance Documentation), 282
single point of reference. *See* SPOR (single point of reference)
SMART objectives, 43
SMEs (communications management experts), 134
Socratic method, 100-101

software development metrics,
PCAD (Project Closure
Acceptance Documentation),
282

SOW (statement of work),
Develop Project Charter,
108-109

SPOR (single point of reference),
118
Project Charter, 57-61
executive summary, 61-63

SPOR charter, 110-112, 119-120

stakeholder management plans,
151

stakeholders, 7
holistic and critical thinking, 178
primary stakeholder
requirements, Project Charter,
80
Project Charter, 91

standards, Project Charter, 81

starting project execution, 217

statement of work (SOW),
Develop Project Charter,
108-109

strategy, 7, 44

structure, Project Charter
dependencies, 88
management approaches, 88-89
project managers, 90
stakeholders, 91
team organization, 91-92

subtask, 8

success
comprehensive open
communication, 176-178
defined, 163

surjective mapping, 74

T

tasks, initiating tasks, 55-56

Taylor, Frederick, 58

team organization, Project
Charter, 91-92

team-related administration,
PCAD (Project Closure
Acceptance Documentation),
282

techniques
directing and managing projects,
219-222
integrating and controlling
changes, 257
scope of projects, 270

term requirements, 169-175

THE CHAOS report, 162

tolerances, Project Charter, 85

tools
directing and managing projects,
219-222
integrating and controlling
changes, 257
scope of projects, 270

transition of project results to
business functions, PCAD
(Project Closure Acceptance
Documentation), 282

U

Uber mind map, 228

Ubi, 98

V

Validate Scope, 260-262
change requests, 251

validated changes, 239

validating scope, 260-262

Values-to-Vision Pyramid, 40

verbal interactions, 225

view, 7

viewpoint, 7

vision, 7

vision statements, 41-42

W

watch lists, 251

WBS (work breakdown structure),
7, 37

100 percent rule, 199-200

Biggerplate, 204-203

component types, 200

components, 200-201

control accounts, 201

Create WBS, 196-199

elements, 201

generic hierarchical format, 203

levels, 201

overview, 193-196

WBS dictionary, 201

WBS ID, 202-203

work packages, 203

WBS dictionary, 201

WBS ID, 202-203

What, 22-24, 99, 127

When, 99

Where, 22-24, 99

Who, 99

Why, 99

work area, 7

work breakdown structure (WBS),
7, 37

work package level, 95

work packages, WBS (work
breakdown structure), 203

work performance data collection,
216

work performance information,
239

work performance report, 251

work performed in projects
monitoring and controlling,
232-234

examples, 238-242

nonlinear project progress, 237

overview, 232

work projects, monitoring and
controlling, 238-242

X-Y-Z

Zachman Framework for
Enterprise Architecture, 98