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A Framework for Strategizing and Defining Project Objectives and Deliverables

Dietmar W. Sokowski
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 Projects 115

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 Requirements 155
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
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.
Most of all, I want to thank my wife, Irmgard, for her unwavering support and for always being at my side.

—Dietmar W. Sokowski
About the Author

**Dietmar W. Sokowski** is the Founder and Chief Consultant of QTunnel Business Consulting, a consultancy focused on critical thinking and a leading provider of services related to enterprise analysis, enterprise architecture, IT strategy, organizational development, project management, and project management training. He has more than 30 years of experience in diverse business fields, including banking, corporate IT, law enforcement, manufacturing, national security, and small businesses.

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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 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 Daries’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 fur 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 fur Normung), 39
Direct and Manage Project Work, 213-215
c change requests, 251
directing and managing projects, 210-213
e 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
(see 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
\begin{itemize}
  \item directing and managing projects, 226
  \item integrating and controlling changes, 251, 254
  \item Project Charter, 93-97
  \item scope of projects, 266, 268
\end{itemize}
integrating and controlling changes
\begin{itemize}
  \item examples, 250-257
  \item holistic viewpoints, 246-249
  \item inputs, 251, 254
  \item outputs, 255
  \item overview, 244
  \item Perform Integrated change control, 244-246
  \item tools and techniques, 257
\end{itemize}
integration, 6, 9
integration and scope management, 8, 10
\begin{itemize}
  \item holistic viewpoints, 11-14
  \item interfaces, Project Charter, 77-78
\end{itemize}
interrogatives, 99
IPO (Input-Process-Output), 6, 26-31
\begin{itemize}
  \item Control Scope, 263
  \item Project Charter, 97
\end{itemize}
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
\begin{itemize}
  \item directing and managing projects, 223-226
\end{itemize}
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  
risk, 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  
ojectives, 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
INDEX 297

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