Introduction

As organizations continue to move toward “project-based” management to get more done with fewer resources, and as the demand for effective project managers continues to grow, more and more individuals find themselves with the opportunity to manage projects for the first time.

In an ideal world, every new project manager candidate would complete certified project management training programs and serve as an apprentice before starting his or her first project manager opportunity, but...this is the real world. In many cases, a quicker, more accessible, and more economical alternative is needed to guide these candidates in managing projects successfully the first time.

The *Absolute Beginner’s Guide to Project Management, Second Edition*, is intended to provide this alternative with a helpful, fun, and informative style.

About This Book

Let’s review the objectives and approach of this book.

Objectives

The objectives of this book include the following:

- To be an easy-to-use tutorial and reference resource for any person managing their first project(s).
- To teach the key concepts and fundamentals behind project management techniques. If these are understood, they can be applied effectively independent of toolset, environment, or industry.
- To reduce the “on-the-job” learning curve by sharing the traits of successful projects and “lessons learned” from less-than-successful projects.
- To balance the breadth of topics covered with adequate depth in specific areas to best prepare a new project manager.
- To review the skills and qualities of effective project managers.
- To emphasize the importance of project “leadership” versus just project “management.”
Approach

Consistent with the *Absolute Beginner’s Guide* series, this book uses a teaching style to review the essential techniques and skills needed to successfully manage a project. By teaching style, we intend the following:

- A mentoring, coaching style.
- A fun, easy-to-read, practical style.
- Assumes that the reader does not have previous hands-on experience with project management.
- Teaches the material as if an instructor were physically present.
- Task-oriented, logically ordered, self-contained lessons (chapters) that can be read and comprehended in a short period of time (15–30 minutes).
- Emphasis on understanding the principle behind the technique or practice.
- Teaches the material independent of specific tools and methodologies.
- Teaches the material with the assumption that the reader does not have access to organizational templates or methodologies.
- Provides a summary map of the main ideas covered at the end of each chapter. Research has shown that this type of “mind-map” approach can drive better memory recollection when compared to traditional linear summary approaches.

OUT-OF-SCOPE

The scope of this book is clearly outlined in the table of contents, but as we will cover later, it is always good to review what is out of scope to ensure understanding of the scope boundaries. Because the field of project management is extremely broad, and we needed to draw the line somewhere, this book focuses on the proper management of a single project. As a result, the following advanced project management subjects are not covered in this book:

- Program management
- Enterprise portfolio management
- Enterprise resource management
- Advanced project risk management topics
- Advanced project quality management topics
- Advanced project procurement management topics
Who Should Read This Book?

The *Absolute Beginner’s Guide to Project Management, Second Edition,* is recommended for any person who fits into one or more of the following categories:

- Individuals unsatisfied with other introductory project management books
- Individuals new to project management, such as
  - Technologists
  - Knowledge workers
  - Students
  - Functional managers
- Professionals taking a first project management assignment, such as
  - Team leaders
  - Project coordinators
  - Project administrators
  - Project support
  - Functional managers
- Experienced project managers needing a refresher course
- Experienced project managers with limited formal project management education

How This Book Is Organized

This book has been divided into five parts:

- Part I, “Project Management Jumpstart,” sets up the general framework for our project management discussion and accelerates your project management learning curve, including an insightful review of successful projects and project managers.
- Part II, “Project Planning,” reviews the processes that establish the foundation for your project.
- Part III, “Project Control,” reviews the processes that allow you to effectively monitor, track, correct, and protect your project’s performance.
- Part IV, “Project Execution,” reviews the key leadership and people-focused skills that you need to meet today’s business demands.
- Part V, “Accelerating the Learning Curve...Even More,” provides experienced insights and tips on making better use of MS Project, managing specific real-life project situations, and on many hot project management topics to further accelerate the knowledge base and skill level of the new project manager.
Conventions Used in This Book

- At the beginning of each chapter, you’ll find a quick overview of the major topics that will be expounded upon as you read through the material that follows.
- The end of each chapter provides a list of key points along with a visual summary map.
- You will also find several special sidebars used throughout this book:

![Note]

These boxes highlight specific learning points or provide supporting information to the current topic.

![Tip]

These boxes highlight specific techniques or recommendations that could be helpful to most project managers.

![Caution]

These boxes highlight specific warnings that a project manager should be aware of.
Essential Elements for Any Successful Project

In this chapter, we want to continue the accelerated learning approach we started in the previous chapter. Anytime you are learning a new skill set, especially one that is as broad as project management, one of the most effective ways to reduce your learning curve and focus your mental energies is to understand what “successful” people do in the field, and, equally important, understand what not to do.

With this philosophy in mind, we will take a step up in this chapter and look at projects as a whole and not just the project manager position. We will review the leading causes of “troubled” projects, and we’ll discuss the common principles, techniques, and tools underlying most successful projects. With this foundation in place, you will better understand the purpose and the value of the fundamentals covered in the rest of this book, and as a result, be much better positioned for success on your project management assignments.
What Exactly Is a “Successful” Project?

You would think it would be relatively straightforward to describe the attributes of a successful project. Well, let’s just say this endeavor has kept more than a few “spin doctors,” “politicians,” and “history revisionists” employed throughout organizations across our great land. Why is this the case? There are several reasons for this.

- There is a lack of universal harmony of what comprises project success metrics. It seems that every project management educational source and organizational process maturity standard has a slightly different definition of project success.
- For many projects, the acceptance and success criteria are never established or agreed to by all key stakeholders.
- In many cases, an organization may define a project as successful even when some of the textbook criteria for project success (such as schedule, cost, and client expectations) are not completely met. This is often the case if the project achieved strategic business or organizational objectives.
- In other cases, a “cancelled” project may be a “successful” project if there was a plan for one or more “go/no-go” decision points.

From a utopian, academic standpoint, the “ultimate” successful project would be defined as a project that:

- **Delivered as promised**—Project produced all the stated deliverables.
- **Completed on-time**—Project completed within the approved schedule.
- **Completed within budget**—Project completed under the approved budget.
- **Delivered quality**—Project deliverables met all functional, performance, and quality specifications.
- **Achieved original purpose**—The project achieved its original goals, objectives, and purpose.
- **Met all stakeholder expectations**—The complete expectations of each key stakeholder were met, including all client acceptance criteria, and each key stakeholder accepts the project results without reservation.

An excellent technique is to identify, document, review, and approve any criteria that will be used to measure the success of the project during the project definition and planning processes.
Maintains “win-win” relationships—The needs of the project are met with a “people focus” and do not require sacrificing the needs of individual team members or vendors. Participants on successful projects should be enthusiastic when the project is complete and eager to repeat a similar experience.

Learning from Troubled Projects

Before we review the common traits of many successful projects, there’s a lot to be learned from “less than successful” projects. From my experience, the reasons for project troubles can be generally classified in two groups: organizational-level issues and project-level issues.

One of the key differences in the two groups is the level of control that the project manager has over these factors. For project-level issues, the project manager has tremendous influence on these matters. In most cases, the project manager can either avoid the issue or take action to resolve it if it does occur. For organizational-level issues, the project manager cannot generally fix the problem, but the project manager can certainly have influence on them by asking the right questions, anticipating the associated risks and issues, focusing extra efforts to compensate for the issue, and developing contingency plans to minimize the impact on the project.

Also, please note that these issues are not exclusive. In most cases, there is overlap, and if you have one of these factors present in a project, you will generally have others. Table 3.1 summarizes these issues, gives specific examples of each, and notes what type of issue it is (organizational, project, or both).

Table 3.1 Common Reasons for Troubled Projects

<table>
<thead>
<tr>
<th>Reason</th>
<th>Example(s)</th>
<th>Type</th>
<th>Key Learning Point</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project not aligned</td>
<td>Project not aligned with business unit or organizational goals; Project not aligned with other projects</td>
<td>Org.</td>
<td>Verify alignment before project kicks off</td>
</tr>
<tr>
<td>Lack of management support</td>
<td>Insufficient funding; Insufficient resources; Issues not resolved; Senior mgmt performance criteria not aligned with project success criteria</td>
<td>Org.</td>
<td>Understand project impact of organizational structure; Ensure proper senior mgmt involvement in project organization; Advocate PMO and Steering Committee structures</td>
</tr>
<tr>
<td>Reason</td>
<td>Example(s)</td>
<td>Type</td>
<td>Key Learning Point</td>
</tr>
<tr>
<td>--------</td>
<td>------------</td>
<td>------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Lack of stakeholder “buy-in”</td>
<td>Purpose and goals not clear; “Trust” relationship not established; Inadequate communications; Mismatched expectations; All stakeholders not involved</td>
<td>Both</td>
<td>Gain acceptance of project purpose, goals, and success criteria up front; Ensure all stakeholders are identified and consulted; Constantly communicate and validate understanding</td>
</tr>
<tr>
<td>Inadequate project sponsor</td>
<td>Inactive, unengaged sponsor; Lack of leadership; Ethical issues; Not handling organizational issues; Not supportive of project management process</td>
<td>Org.</td>
<td>Educate the sponsor on their roles and responsibilities; Gain formal authorization of project and the project manager position; Understand sponsor’s motives and incentives</td>
</tr>
<tr>
<td>Too many project sponsors</td>
<td>Conflicting project goals; Lack of ownership; Political battles</td>
<td>Org.</td>
<td>Relates to the need for proper project alignment and clear roles and responsibilities</td>
</tr>
<tr>
<td>Lack of clarity on roles and responsibilities</td>
<td>Inefficient work efforts; Missed deadlines; Lower team morale; Delayed issue resolution</td>
<td>Both</td>
<td>Use Responsibility Matrix to clarify all roles and responsibilities; Review roles and responsibilities with each individual; Validate expectations in advance</td>
</tr>
<tr>
<td>Poor communication</td>
<td>Inconsistent, incomplete, or nonexistent status information on key project metrics; Inadequate tracking and monitoring of project progress; Not listening to stakeholder concerns or feedback; Not using proper mediums for certain project communications; Messages are not clear or occur too frequently</td>
<td>Project</td>
<td>Develop a project Communications Plan that is acceptable to all stakeholders; Establish tracking and monitoring mechanisms during planning; Constantly seek questions and feedback; Understand each stake holder's perspective; Clearly set context of each message</td>
</tr>
<tr>
<td>Price wars</td>
<td>Due to budget reduction measures or market pressures, management agrees to perform project at or below estimated costs</td>
<td>Org.</td>
<td>Develop complete, detailed project budgets; Communicate associated risks; Improve negotiating skills</td>
</tr>
<tr>
<td>Reason</td>
<td>Example(s)</td>
<td>Type</td>
<td>Key Learning Point</td>
</tr>
<tr>
<td>---------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>-------</td>
<td>------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Resource conflicts</td>
<td>Lack of dedicated team members; Key resources not available when scheduled</td>
<td>Org.</td>
<td>Develop project Resource Plan; Gain commitments from Resource Managers; Encourage centralized organizational structure for resource planning/deployment</td>
</tr>
<tr>
<td>Inadequate project manager</td>
<td>Lack of leadership; Inexperienced or untrained project manager; Ineffective project manager</td>
<td>Both</td>
<td>Organizational commitment to PM education; Use of PM mentorship programs</td>
</tr>
<tr>
<td>Underestimate change impact</td>
<td>Not understanding the complete effects on both and people existing processes that the “change” introduced by the project will have; Not properly preparing or planning for the “change”</td>
<td>Org.</td>
<td>Use project sponsor and business process owners to champion the new process; Involve additional stakeholders to understand their needs and to solicit their support; Plan for the necessary communications and training (change management plan); Plan for the “disruptive” deployment period; Utilize pilot approaches to minimize impact</td>
</tr>
<tr>
<td>Inadequate planning</td>
<td>Management does not require or allow time for proper planning; Incomplete scope or deliverables list; Incomplete “work” identification; Lack of detailed schedule; Inadequate risk identification; Assumptions not documented; Lack of schedule and budget contingency</td>
<td>Both</td>
<td>Educate senior mgmt on the value of proper planning; Use standard methodology for project planning; Gain formal acceptance of Project Plan before proceeding; Develop realistic project schedule and budget, as well as tools and processes to keep updated; Identify and document project risks and mitigation strategies</td>
</tr>
</tbody>
</table>
Table 3.1 (continued)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Example(s)</th>
<th>Type</th>
<th>Key Learning Point</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of change control management</td>
<td>Scope of work increases without proper schedule, budget, or resource adjustments; Changes occur to deliverables, schedule, or budget without proper notification and approval</td>
<td>Project</td>
<td>Utilize formal change control procedures to properly assess and communicate any change to the scope, schedule, budget, and targeted project deliverable</td>
</tr>
<tr>
<td>Lack of completion criteria</td>
<td>Missed stakeholder expectations; Increased costs or missed deadlines due to re-work; Lack of smooth transition from one phase to another</td>
<td>Both</td>
<td>Ensure success criteria is established during planning phase; Define user acceptance criteria for project deliverables; Define exit criteria for project phases</td>
</tr>
<tr>
<td>Inadequate progress tracking</td>
<td>Inability to measure project status and probability for success; Inability to review project at key points to make go/no-go decisions</td>
<td>Both</td>
<td>Establish and execute periodic status meetings and reporting (weekly in most cases); Review project at scheduled intervals against established criteria to determine if project should progress into next phase</td>
</tr>
<tr>
<td>Unforeseen technical difficulties</td>
<td>Effort spent resolving technical issues drive missed schedules and increased costs; Unproven technology does not meet user expectations</td>
<td>Project</td>
<td>Structure project to deal with high risk technical challenges early in the project; Prove the technology before making additional investment; Leverage technical expertise to support team capabilities</td>
</tr>
</tbody>
</table>

Learning from Successful Projects

After reviewing what makes a project successful and the common ills that befall many troubled projects, you likely have a good sense of the qualities and traits shared by most successful projects. While no two projects are ever the same, and every project has its own...
unique set of challenges, there is a common core of principles that successful projects share. By understanding these, a new project manager can better prioritize and better focus his/her project management efforts. These qualities are generally true about successful projects:

- Project is aligned with organizational goals.
- Project has effective management support.
- Project has effective leadership.
- All key stakeholders are in agreement on the purpose, goals, and objectives of the project.
- All key stakeholders share a common vision on the project results.
- All key stakeholders share realistic expectations for the project results.
- The project results meet the expectations of the key stakeholders.
- Stakeholder expectations are constantly managed and validated throughout the project.
- There is an investment made in proper planning.
- The project scope, approach, and deliverables are clearly defined and agreed upon during planning.
- Each stakeholder and team member’s role(s) and responsibilities are clearly communicated and understood.
- A high priority is placed on accurate and complete work effort estimates.
- A realistic schedule is developed and agreed upon.
- The project team has a strong results-focus and customer-orientation.
- Project communications are consistent, effective, and focused on “understanding.”
- Project progress is measured consistently from the current baseline.
- Project issues and subsequent action items are aggressively pursued.
- There is a strong sense of collaboration and teamwork.
- Expectations and changes surrounding scope, quality, schedule, and cost are closely managed.
Project resources are skilled and available when needed.

Project team proactively identifies risk and determines mitigation strategies to reduce project exposure.

Project team anticipates and overcomes obstacles to ensure project meets objectives.

## Essential Project Manager Toolkit

While there are many facets of project management and many lessons to be learned from both troubled projects and successful projects, there is an essential set of tangible tools that any project manager needs to have to best manage any project. Table 3.2 lists these essential tools and why they are important.

The important principles to remember regarding project management tools are as follows:

- Any planning document needs to be reviewed and agreed to by appropriate project stakeholders and team members.
- Separate documents are not always needed. Smaller projects might combine relevant information (especially “plan” documents) into a single “grouped” document.
- The essential tools represent the key information and thought processes that are needed to effectively manage the project.

### Table 3.2 Essential Project Manager Tools

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
<th>Value</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Charter</td>
<td>Authorizes project and the project manager</td>
<td>Provides official notice to the organization</td>
<td>May not always be a formal document; At a minimum, get an email notification</td>
</tr>
<tr>
<td>Project Definition</td>
<td>Defines project purpose, objectives, success criteria, and scope statement</td>
<td>Key for managing expectations, controlling scope, and completing other planning efforts</td>
<td>Core tool</td>
</tr>
<tr>
<td>Requirements Document</td>
<td>Defines the specifications for product/output of the project</td>
<td>Key for managing expectations and controlling scope</td>
<td>Core tool</td>
</tr>
<tr>
<td>Tool</td>
<td>Description</td>
<td>Value</td>
<td>Notes</td>
</tr>
<tr>
<td>--------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Project Schedule</td>
<td>Shows all work efforts, properly estimated, with logical dependencies, assigned to responsible resources scheduled against a calendar</td>
<td>Key for directing all project team work efforts; Key for managing expectations; Allows for impact and what-if simulations when things change</td>
<td>Core tool</td>
</tr>
<tr>
<td>Status Reports</td>
<td>Periodic reviews of actual performance versus expected performance</td>
<td>Provides essential information to stakeholders; Allows for timely identification of performance variances</td>
<td>See Chapter 10, “Controlling a Project,” and Chapter 17, “Managing Project Communications,” for more details</td>
</tr>
<tr>
<td>Milestone Chart</td>
<td>A summary of the detailed project schedule showing progress against key milestone</td>
<td>Allows stakeholders to see high level project progress on one page</td>
<td>Detailed schedule roll-ups can be difficult to read and interpret; Incorporate into Status Report</td>
</tr>
<tr>
<td>Project Organization Chart</td>
<td>Shows all project stakeholders and the working relationships among them</td>
<td>Allows team members to get a better understanding of project roles and organizational dynamics</td>
<td>On smaller projects, may be combined with project plan or project definition document</td>
</tr>
<tr>
<td>Responsibility Matrix</td>
<td>Defines all project roles and indicates what responsibilities each role has</td>
<td>Key for managing expectations; Establishes accountability</td>
<td>On smaller projects, may be combined with project plan or project definition document</td>
</tr>
<tr>
<td>Communication Plan</td>
<td>Defines the how, what, when, and who regarding the flow of project information to stakeholders</td>
<td>Key for managing expectations; Establishes buy-in</td>
<td>On smaller projects, may be combined with project plan or project definition document</td>
</tr>
<tr>
<td>Tool</td>
<td>Description</td>
<td>Value</td>
<td>Notes</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Quality Management Plan</td>
<td>Defines the approaches and methods that will be utilized to manage the quality levels of project processes and results</td>
<td>Key for managing expectations regarding quality, performance, and regulatory compliance matters; Impacts work efforts and project schedule Establishes accountability</td>
<td>On smaller projects, may be combined with project plan or project definition document</td>
</tr>
<tr>
<td>Staffing Management Plan</td>
<td>Lists how project resources will be acquired, when they are needed, how much they are needed, and how long they will be needed</td>
<td>Key for building schedule; Key for properly managing resources</td>
<td>May also include role profiles, rates, training needs; On smaller projects, may be combined with project plan or project schedule</td>
</tr>
<tr>
<td>Risk Response Plan</td>
<td>Lists each identified risk and the planned response strategy for each</td>
<td>Communicates potential issues in advance; Proactive measures help reduce impact to project</td>
<td>On smaller projects, may be combined with project plan or project definition document</td>
</tr>
<tr>
<td>Project Plan</td>
<td>Formal, approved document that is used to manage project execution</td>
<td>Includes all other supplemental planning documents; Key output of project planning</td>
<td>On smaller projects, may be combined with project definition document</td>
</tr>
<tr>
<td>Deliverable Summary</td>
<td>Defines and lists all deliverables to be produced by the project</td>
<td>Key to managing expectations; Ensures proper visibility, tracking, and reporting of targeted deliverables</td>
<td>May be combined with status reports</td>
</tr>
</tbody>
</table>
Table 3.2 (continued)

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
<th>Value</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Log</td>
<td>Captures essential information for each project risk, issue, action item, and change request</td>
<td>Ensures proper visibility, tracking, and reporting of items impacting the project</td>
<td>Core tool</td>
</tr>
<tr>
<td>Change Request Form</td>
<td>Captures essential information for any requested change that impacts scope, schedule, or budget</td>
<td>Allows change item to be properly assessed and communicated before action is taken</td>
<td>Core tool</td>
</tr>
<tr>
<td>Project Notebook</td>
<td>Used by project manager to maintain official record of important project documents and deliverables</td>
<td>Part of managing project information</td>
<td>Electronic and/or hardcopy versions</td>
</tr>
</tbody>
</table>

**The Absolute Minimum**

At this point, you should have a solid understanding of the following:

- What defines a successful project and why it is not always easy to measure
- The common reasons why projects get in trouble and what you can do to avoid them
- The key principles that serve as the foundation for most successful projects
- The essential project management tools and why they are important

The map in Figure 3.1 summarizes the main points we reviewed in this chapter.
FIGURE 3.1
Essential elements for any successful project overview.
Index

Numerics

15% Completion Rule (project control), 130
30/60/90 day detail plans in quality schedules, 331
50% probability estimate in CCPM, 354
“90% done” phenomenon, 140
90% probability estimate in CCPM, 354

A

absorption method (project closure), 298
AC (Actual Costs) in EVM (Earned Value Management), 137
accents, listening skills (difference management), 274
acceptance
  project definition checklist, 51
  project management process groups, 10
  project schedule goals, 101
  project success tips, 30
acceptance criteria
  buyer tips and techniques (vendor management), 283
  contract components, 287
  project planning, 60
  quality management practices, 206
  unplanned scope change causes, 150
  vendor management, 285
  acceptance signoffs (change prevention actions), 154
accepting risk, 185
access control (managing deliverables), 163
accomplishments
  performance reporting, 134
  project closure, 296
accountability
  increased (recovery activities), 141
  lack of (project closure challenges), 297
accounts, closing (project closure), 295
accuracy (work estimation), 92
action (project control principles), 127-128
active listening skill sets, 24
Actual Costs (AC) in EVM (Earned Value Management), 137
actual dates, 306
administrative process principles (issue management systems), 172
agendas (meeting practices), 235
agile development (quality management), 204
agile project management, 346-348
agreement
  change control challenges, 156
  lack of understanding, project manager mistakes, 27
  project success tips, 35
alertness (change control), 150
aligners, 213
alignment
  issue management systems, 172
  lack of, 31
  project success tips, 35
allocation of resources by PMOs, 351
alternative approaches (project definition), 47
analogous estimating (work estimation), 90
analysis (project manager roles), 22
appreciation and gratitude communications management, 228 interpersonal skills, 236
approach (project definition checklist), 51
approval page (document sections), managing deliverables, 164
approvals change control challenges, 156 change control principles, 151 change request forms, 153 managing deliverables, 161-163 protection management, 163 work estimation practices, 92
archived files, leveraging (managing deliverables), 166
assessing risk, 186
assigned to data points (issue management), 175
assigning resources, 316 rebuilding assignments, 325 to summary tasks, 317, 323 viewing assigned resources, 324
assignment (difference management), 270
assumptions budget development, 116 change prevention actions, 155 definition of, 193 difference management, 273 project definition elements, 47
attention (communications management), 229
audio conferencing (communications management), 233
auditors (project control), 132
audits configuration management plans, 168 project control, 131 QA audits, 193 quality management principles, 201-202
authority of PMO (Project Management Office), 348 project and operation comparisons, 9
authorization identification (contract components), 287
autolinking, disabling, 314
availability of resources, adjusting in calendars, 307 averages (work estimation), 91
avoiding risk, 185
awareness campaigns (communications management), 224
backup plans project deliverables, 165 team performance principles, 263
balancing reality and perception, 241
bar charts performance reporting, 134 project schedule presentations, 109
baseline dates, 306 saving, 324
baseline management (scheduling software benefits), 105
baselines change control benefits, 149 managing deliverables, 161, 164 performance reporting, 134 project control, 131, 140 resetting, 312-313
change control, 152 recovery activities, 141 variance responses, project control, 136 reviews, 131
beliefs and values (communication challenges), 227
best practices creating new projects, 313-316 issue management systems, 176-177 work estimation, 92-94
Bill of Materials (BOM), 78
bottom-up estimating (work estimation), 90
breach of contract (contract termination), 298
Budget at Completion (BAC) in EVM (Earned Value Management), 138
budget development, 113. See also budgets
assumptions, documenting, 116
buffers, 116
cash flow management tool, 115
challenges of, 120-121
comprehension principle, 115
cost estimate models, 119
costs of change, 119
disposal costs, 118
earned value management, 114
equipment sources, 116
expectation measurements, 115
expenses versus capital, 117
finalization, 120
initial development, 119
investment justification, 115
iterative process principle, 115
labor costs sources, 116
licensing and fees, 118
lifecycle principle, 115
materials, 118
operational costs, 118
overhead costs, 118
performance measurement importance, 114
reasons for, 114-115
spreadsheet approach, 119
time-phased principle, 115
training sources, 118
travel sources, 118
validation importance, 114
work estimation accuracy, 92
budgets. See also budget development; costs
change control principles, 152
lack of, 32
project planning, 64
project success tips, 30
schedules, 100-101
buffer consumption rates in CCPM, 355
buffers, budget development importance, 116
build/release process (managing deliverables), 166
bullet points (status reporting), 234
business drivers (unplanned scope change causes), 150
business management skills, skill sets, 23
buy-ins
change control, 152, 156
difference management principles, 268
issue management systems, 177
lack of, 32
lack of understanding, project manager mistakes, 27
vendor management, 281
buyer tips and techniques (vendor management), 283
acceptance criteria, 283
certifications, 285
cost and time estimates, validating, 284
incentives, 283
new vendors, trying out, 284
partnerships, 284
quality assurance, 284
quality enhancements, 284
resource and process dependencies, 283
risk reduction, 283-284
vendor teams, integrating, 284
WBS (work breakdown structure), 283
Buzan, Tony, 358
C
calculations (scheduling software benefits), 105
calendars. See also schedules
adjusting resource availability, 307
multiple calendars in Microsoft Project, 305
nonstandard calendars, updating timescales for, 323
realistic project schedules, 107
types of, 306
working time, setting, 315
callouts in reports, 322
calm natured techniques (success tips), 26
cancellations
project closure, 298
variance responses, project control, 136

How can we make this index more useful? Email us at indexes@quepublishing.com
capital, expenses versus (budget development), 117

CAPM (Certified Associate Project Management Professional) certification, 359

career goals (team performance principles), 258

career paths (project management as personal value points), 13

cash flow (budget development importance), 115

category data points (issue management), 174

CCB (Change Control Board), 154

CCPM (Critical Chain Project Management), 353-356

celebrations (project closure), 296

central contacts communications management, 230
issue management, 174

central repository (managing deliverables), 163, 168

certifications value of, 358-359
vendor management, 285

Certified Associate Project Management Professional (CAPM) certification, 359

chain of command (difference management), 270

challenges (budget development), 120-121

change control alertness, 150
baselines, resetting, 152
buy-ins, 152
challenges, 156-157
Change Control Board, 154
change control systems, 149
change prevention actions acceptance signoffs, 154
assumptions and constraints, tracking, 155
clear project objectives, 154
post-implementation, 155
right project approach, 155
solid requirements definition, 154
stakeholder engagement, 155
traceability, 154
WBS (work breakdown structure), 155
change request forms, 152-153
change types, 147
changes, planning for, 149
configuration and organizational management comparisons, 148
contract alignment, 152
contract components, 287
defined, 146-147
identification numbers, 153
lack of, 33-34
lack of understanding, project manager mistakes, 27
managing deliverables, 160-161
multiple process paths, 152
over-communication, 150
overview, 145-146
principles, 151
proactive project management, 57
project control, 128-129, 139
project definition, 47
project planning, 58, 65, 67
scope changes, minimizing, 149-150
scope creep, 146
spreadsheets, 153
stakeholders, educating, 149
tracking logs, 153
unplanned scope change causes, 150-151
vendor management, 281

Change Control Board (CCB), 154

change impact (communications planning), 228

change information (change request forms), 153

change management (project management trends), 17

change prevention actions acceptance signoffs, 154
assumptions and constraints, tracking, 155
clear project objectives, 154
post-implementation, 155
right project approach, 155
solid requirements definition, 154
stakeholder engagement, 155
traceability, 154
WBS (work breakdown structure), 155
change requests
change control, 152-153
communications management, 224
performance reporting, 134
charters (project success tools), 36
charts
bar, 134
Gantt, 109
milestones, 37
organization, 37
PERT, 91
project schedule presentations, 109
checklists
project definition
acceptance checklist, 51
approach checklist, 51
documentation checklist, 51
general checklist, 49
risk checklist, 51
scope checklist, 50
stakeholder checklist, 50-51
project definition, 49
project planning, 68-69
quality management principles, 201
quality management tools, 201
in testing process, 342
checkpoints (project control), 132
clarification
communications management, 229
WBS, 74-75
clarity traits (team performance), 256
clarity, communication (recovery activities), 141
clear (five Cs of communication), 228
clear project objectives (change prevention actions), 154
clear project process (issue management systems), 174
client acceptance (project closure), 294
client interaction preparation (team performance principles), 261
client organization (vendor management), 280
closing project management process groups, 10
closing projects, 298
absorption method, 298
cancellations, 298
challenges, 296-297
collapse method, 298
closure (meeting practices), 235
CM indicator (deliverable tracker recommendations), 165
coaches, 213
coding schemes (WBS guidelines), 81
collaboration
in agile project management, 347
project management challenges, 15
project success tips, 35
Project End checklists, 294
accomplishment, acknowledging, 296
accounts, closing, 295
central information repository, updating, 295
clients acceptance, 294
close, 295
deliverables, transitioning, 295
lessons learned, capturing, 295
payments, finalizing, 295
performance evaluations, 296
referrals/references, 296
resource schedule updates, 295
resumes, updating, 295-296
success criteria, 294

How can we make this index more useful? Email us at indexes@quepublishing.com
collaboration tools (issue management logging systems), 176

collapse method (project closure), 298

collocation (team performance principles), 260

color-coding (status reporting), 234

columns, hiding, 319

commitment
from resource managers (difference management), 271
team performance, 256
vendor management, 282

common mistakes by project managers, 27

communication
active listening, 24
change control principles, 152
clarity (recovery activities), 141
contract components, 287
difference management
cross-functional projects, 272
principles of, 268-270
virtual projects, 276
lack of, 32
work estimation reasons, 89
lack of understanding, project manager mistakes, 27
managing, 223
appreciation and gratitude, 228
audio conferencing, 233
central contact assignment, 230

challenges of, 226-227
communication options, 231-233
conflict resolution, 225
documentation, 228
email, 225, 233
expectations, 225
face-to-face meetings, 225, 232
five Cs of communication, 228-229
follow-ups, 228
information flow, 231
instant messaging, 233
interpersonal skills, 235-236
meeting practices, 234-235
meetings, 225
message content considerations, 231
naiveness, 229
natural communication strengths, 230
organizational change management areas, 224
planning, 227-228
prioritization, 228
proactive approach, 229
project schedule considerations, 228
push and pull methods, 231
reasons for, 225-226
relationship building techniques, 229
responsibility, 229
stakeholder analysis, 230
standard communication areas, 224

status reporting, 234
team management, 225
technology use, 232
telephone contact, 225, 232
urgent communications, 231
video-conferencing, 232
voice mail, 225, 232
Web conferencing, with audio, 233

obstacles, project management challenges, 14
over-communicating (change control), 150
planning (project success tools), 37
of PMO, 350
proactive project management, 57
project management knowledge areas, 11
in project management “lite” culture, 328
project planning, 66-67
project success tips, 35
quality management practices, 206
skill sets, 24
team orientation plans, 262
vendor management, 281, 286
in vendor selection process, 339
WBS guidelines, 80

compelling (five Cs of communication), 229

compensating for weaknesses, 218
contract development time in vendor selection process, 340
contracts acceptance criteria, 287
authorization identification, 287
change control, 152
challenges, 156
procedures, 287
communications components, 287
communications planning, 228
contract administrator and project manager conflicts, 282
contract state knowledge, 281
CPFF (cost plus percent of fee), 288
CPPC (cost plus percent of cost), 288
CR (cost reimbursable), 287-289
failure to perform liability, 287
financial arrangements, 287

How can we make this index more useful? Email us at indexes@quepublishing.com
FP (fixed price), 287-289
issue resolution, 287
legality conditions, 287
milestone dates, 287
non-disclosure agreements, 287
obligations, project closure, 295
ownership and property right components, 287
penalty components, 287
performance measurement components, 287
scope statements, 287
security agreement components, 287
T&M (time and materials), 287-289
terminating, 298
timetable dates, 287
vendor management development, 281
what to include, 282

contractual WBS (CWBS), 78

control
project management as organization value points, 12
project management key concepts, 9
project management process groups, 10
WBS objectives, 78

control systems (project planning), 65

controlling projects
15% Completion Rule, 130
action, 127-128
baselines, 131, 140
change control, 128-129, 139
checkpoints, 132

completion criteria, 131, 140
configuration management, 128
considerations, 126
consistency, 130, 140
detection, 127
eyearly project stage management, 130
escalation thresholds, 133
EVM (Earned Value Management), 136-139
expectations, setting, 130
formal signoffs, 132
issue management, 128
management processes, 128
milestones, 132
organization culture, 130
overview, 125-126
PDA (Prevention, Detection, and Action), 127-128
performance reporting, 128, 133-135
planning, 130
prevention, 127
priorities, 129
process control, 129
procurement management, 128
progress measurement challenges, 140
project manager reluctance challenges, 139
project scale, 129
quality auditors, 132
quality management, 128
recovery activities, 141
requirements management, 128
traceability challenges, 140
traceability matrix, 132
reviews, 131
risk management, 128
small work packages, 131
status meetings, 131
team connection challenges, 140
time and cost accounting challenges, 139
unidentified work challenges, 140
V method approach, 132
variance responses, 135-136

Copy Picture feature, 311, 320
core project components in project management “lite” culture, 328
corporate culture, aligning PMO with, 350
corporate governance
difference management, 270-271
elements of, 353
in portfolio project management, 352
project management trends, 17
corrective actions
project management key concepts, 9
project manager roles, 23
variance responses, project control, 135
correctness (WBS guidelines), 81
cost analysis (issue management systems), 172
cost challenges (project control), 139
cost estimation  
incorrect, work estimation reasons, 89  
validating (vendor management), 284  
WBS guidelines, 80  
WBS objectives, 78

cost management (project management knowledge areas), 11

cost performance in EVM (Earned Value Management), 136

Cost Performance Index (CPI) in EVM (Earned Value Management), 137

cost plus percent of cost (CPPC) contracts, 288

cost plus percent of fee (CPFF) contracts, 288

cost reimbursable (CR) contracts, 287-289

Cost Variance (CV) in EVM (Earned Value Management), 137

costs. See also budgets  
project definition elements, 48  
project management as organization value points, 13  
project management challenges, 14  
project planning, 64  
work estimation practices, 94

courteous (five Cs of communication), 229

Cover Your Assets (CYA), managing deliverables, 162

CPFF (cost plus percent of fee) contracts, 288

CPI (Cost Performance Index) in EVM (Earned Value Management), 137

CPPC (cost plus percent of cost) contracts, 288

CR (cost reimbursable) contracts, 287-289

crashing technique (shortening project schedules), 108

creativity (project management as organization value points), 12

credibility (change control benefits), 149

Critical Chain Project Management (CCPM), 353-356

critical issues (project planning), 65

critical paths  
disabling multiple, 314  
project schedules, 103  
scheduling software benefits, 105  
shortening project schedules, 108

Crosby, Philip, 198

cross-cultural projects (difference management)  
accents, listening skills, 274  
days off differences, 273  
formality considerations, 274  
misunderstandings, 273  
potential impacts, 274  
time zone considerations, 273

cross-functional projects (difference management), 271  
alignment considerations, 271  
assumptions, 273  
commitments, retrieving from resource managers, 271  
communications planning, 272  
dysfunctional relations, 272  
group contribution importance, 271  
issue resolution, 272  
kickoff meetings, 272  
leadership designation, 271  
misunderstandings, 273  
poor performance, 270 requirements definition, 272-273  
signatures, reluctant, 273  
sponsorship and governance ensured, 270-271  
unstated expectations, 273  
workflow process focus, 272

cross-functional teams (project management trends), 17

cultural influences (communication challenges), 227

cultures  
cross-cultural projects (difference management), 273-274  
project management trends, 17

custom fields, 307  
in reports, 319

How can we make this index more useful? Email us at indexes@quepublishing.com
CUSTOM FIELDS

setting up, 316
visual indicators in, 308-310
customer expectations (project success tips), 35
customer experience in testing process, 341
customer focus (quality management practices), 206
customer perspective (quality management principles), 200
customer satisfaction in agile project management, 346
customer service skills (success tips), 26
customer-focused project approaches (quality management), 203-204
customizing reports, 321
cutting edge demands (project management challenges), 14
CV (Cost Variance) in EVM (Earned Value Management), 137
CWBS (contractual WBS), 78
CYA (Cover Your Assets), managing deliverables, 162
data points (issue management systems), 174-177
data validation in testing process, 342
databases
issue management logging systems, 176
Microsoft Project as, 304
date approved (deliverable tracker recommendations), 165
date closed data points (issue management), 175
date issued data points (issue management), 174
date resolved data points (issue management), 175
date submitted data points (issue management), 175
date updated data points (issue management), 175
dates
baseline dates, saving, 324
constraints on, 305
planned versus actual versus baseline, 306
start dates, setting, 313
days off differences (difference management), 273
deadlines, missed, 32
decision points (project success tips), 30
decision-making (project management as organization value points), 13
default settings
Microsoft Project, 306
reviewing, 314-315
defect tracking process in testing process, 342-343
defects, definition of, 193
defining projects, 49
acceptance checklist, 51
alternative approaches, 47
approach checklist, 51
assumptions, 47
constraints, 47
context, 46
cost estimates, 48
dependencies, 46
documentation checklist, 51
financial reasons for, 45
general checklist, 49
goals and objectives, 46
history reasons for, 45
logistical reasons for, 44
organizational change issues, 47
out-of-scope specifications, 46
polices and standards, 48
political reasons for, 44
portfolio project management, 45
practical reasons for, 45
progressive elaboration, 47
purpose, 46
questions/considerations, 44
recommended project approach, 47
resource estimates, 48
risks, 47, 51
schedule estimates, 48
scope, 46, 50
stakeholders, 47, 50-51
success criteria, 46
supporting document references, 48
validation, 59
visual scope summary, 48
definition documents (project success tools), 36
definitive accuracy levels (work estimation), 92
deliverable summary (project success tools), 38

deliverables
communications management, 224
managing
access control implementation, 163
approval processes, 163
archived files, leveraging, 166
backup procedures, 165
baseline establishment, 164
best practices, 163-166
build/release process, 166
central repository, establishing, 163
challenges, 169
change control system, 160
configuration management, 160, 166-168
CYA (Cover Your Assets), 162
directory structures, 164
file-naming conventions, establishing, 164
gatekeepers, defining, 163
identity management, 162-163
protection management, 163
reasons for, 161-162
review processes, 163
revision processes, 163
standard document sections, 164
tracking recommendations, 164-165
tracking systems, 163

version numbering schemes, 164
in project management "lite" culture, 329
project planning, 58-60, 65
in quality schedules, 330
transitioning, project closure, 295
WBS development process, 80
WBS guidelines, 80-81
delivered as promised (project success tips), 30
delivery management (vendor management), 281
Deming, W. Edwards, 198
dependencies
definition of, 193
external dependencies, setting, 315
logical dependencies, capturing, 316
project definition elements, 46
deploy phase (effort distribution phase), 90
design reviews (project control), 131
detailed data points (issue management), 174
detailed schedules
in agile project management, 346
lack of (example scenario), 330-331
details (project planning), 58
detection (project control principles), 127
deterioration method (project closure), 298
development
project management key concepts, 9
schedules, project planning, 61-62
WBS, 79-80
diagrams (project schedule presentations), 110
differences, managing, 267-268
buy-in principles, 268
communication principles, 268-270
cross-cultural projects, 273-274
cross-functional projects, 270-273
expectations, verifying, 270
leadership principles, 269
management efforts, 270
proper planning principles, 268
risk management principles, 268
sponsorship principles, 268
virtual projects, 274-276
well-defined expectation principles, 268
dining (team unity rituals), 261
directory structure (managing deliverables), 164, 168
disabling
autolinking, 314
multiple critical paths, 314

How can we make this index more useful? Email us at indexes@quepublishing.com
discipline (issue management systems), 173

displacement (project closure), 298

disposal costs (budget development), 118

document sections (managing deliverables), 164

documentation
  change control
    challenges, 157
  change control
    principles, 152
  communication, difference management, 269
  communications management, 228
  gaps in vendor selection process, 340
  issue management systems, 172
  project definition checklist, 51
  project manager roles, 23
  of testing process, 341

documents
  definition documents, 36-37
  inserting projects with Copy Picture feature, 311
  plan, 36
  Project Definition. See defining projects
  requirements documents (project success tips), 36
  supporting document references, 48

drivers for hard milestone dates, 331

Duran, Dr. Joseph, 198

duration
  determining, 305
  entering, 316
dysfunctional relations (cross-functional projects), 272

e
EAC (Estimated At Completion)
  EVM (Earned Value Management), 138
  forecasts (performance reporting), 134
early project stage (project control), 130
Earned Value (EV) in EVM (Earned Value Management), 137

Earned Value Management (EVM)
  AC (Actual Costs), 137
  BAC (Budget at Completion), 138
  budget development importance, 114
  cost performance, 136
  CPI (Cost Performance Index Value), 137
  CV (Cost Variance), 137
  EAC (Estimate at Completion), 138
  earned values, 137
  ETC (Estimate to Complete), 138
  EV (Earned Value), 137
  fourth reporting period example, 139
  negative performance index, 138
  overview, 136
  PV (Planned Value), 137
  schedule performance, 136
  SPI (Schedule Performance Index), 137
  SV (Schedule Variance), 137
  work packages, planned values, 137

effort distribution estimating (work estimation), 90

effort estimation (project schedule inputs), 101, 103

elaboration phase (effort distribution estimating), 90

email (communications management), 225, 233

emotions
  communication challenges, 227
  interpersonal skills, communications management, 236

encouragement (project planning), 68

end results (WBS development process), 80

ending projects, 293
  absorption method, 298
  cancellations, 298
  challenges, 296-297
  collapse method, 298
  completion method, 298
  contract termination, 298
  deterioration method, 298
  displacement method, 298
  lack of closure, 294
official closure signals, 294
personal interaction
analogy, 293
Project End checklists, 294
accomplishment,
acknowledging, 296
accounts, closing, 295
celebration events, 296
central information
repository, updating, 295
client acceptance, 294
contract obligations,
closing, 295
deliverables,
transitioning, 295
lessons learned,
capturing, 295
payments, finalizing, 295
performance
evaluations, 296
referrals/references, 296
resource schedule
updates, 295
resumes, updating,
295-296
success criteria, 294
energy levels (team
performance), 256, 259
environment noise
(communication
challenges), 227
equipment sources (budget
development), 116
escalation procedures (issue
management systems), 174
escalation thresholds (project
control), 133
Estimated At Completion (EAC)
EVM (Earned Value
Management), 138
forecasts (performance
reporting), 134
estimated duration,
entering, 316
Estimated To Complete (ETC)
EVM (Earned Value
Management), 138
forecasts (performance
reporting), 134
estimates in CCPM, 354
estimating work
accuracy levels, 92
analogous estimating, 90
best practices, 92-94
bottom-up estimating, 90
effort distribution
estimating, 90
expert judgment method, 91
heuristic estimating, 90
historical data, 91
overview, 85-86
parametric estimating, 91
PERT charts, 91
phased estimating, 91
project management
challenges, 15
project planning, 61
reasons for, 88-90
risk analysis, 88
risk factor methods, 92
schedule development
process, 86
team consensus, 92
weighted averages, 91
ETC (Estimated To Complete)
EVM (Earned Value
Management), 138
forecasts (performance
reporting), 134
EV (Earned Value) in EVM
(Earned Value
Management), 137
evaluation
change control
principles, 151
project closure, 296
vendor management,
281, 286
evaluation criteria in vendor
selection process, 338
evaluation scoring in vendor
selection process, 338-339
evaluation team in vendor
selection process, 338
evidence (managing
deliverables), 162
EVM (Earned Value
Management)
AC (Actual Costs), 137
BAC (Budget at
Completion), 138
budget development
importance, 114
cost performance, 136
CPI (Cost Performance
Index), 137
CV (Cost Variance), 137
EAC (Estimated at
Completion), 138
earned values, 137
ETC (Estimated to
Complete), 138
EV (Earned Value), 137
fourth reporting period
example, 139
negative performance
index, 138
How can we make this index more useful? Email us at indexes@quepublishing.com
overview, 136
PV (Planned Value), 137
schedule performance, 136
SPI (Schedule Performance Index), 137
SV (Schedule Variance), 137
work packages, planned values, 137

example scenarios
hard milestone dates, 331-333
lack of detailed scheduling ability, 330-331
project management “lite” culture, 328-330
resource management problems, 333-334
testing process, 340-343
turnover, handling, 334-335
vendor selection process, 335-340

execution
lack of understanding, project manager mistakes, 27
project management process groups, 10

executive reports (communications management), 224

expectations
communications management, 225
difference management (cross-functional projects), 273
difference management (project management challenges), 14
experience (communications management), 236
experience levels (communications planning), 228
expert judgment (work estimation), 91
expertise (team performance principles), 260
external dependencies setting, 315
task relationships (project schedules), 105

external sources (communications planning), 228

F

face-to-face meetings
communications management, 225, 232
difference management (virtual projects), 275
facilitating progress, 217
facilitation
communications management, 235
issue management systems, 173, 176
project manager roles, 22
facilitators, 213
failure to perform liability (contract components), 287
FAQs (Frequently Asked Questions), communications management, 224
fast analysis (budget development), 119
fast-tracking technique (shortening project schedules), 108
feedback (team performance principles), 263
feeder buffers in CCPM, 354
fields, custom, 307
  in reports, 319
  setting up, 316
  visual indicators in, 308-310
15% Completion Rule
  (project control), 130
50% probability estimate in
  CCPM, 354
file naming conventions
  deliverable tracker
    recommendations, 165
  managing deliverables, 164, 168
filtering tasks, 312
finalization
  budget development, 120
  project schedules, 104
finances (project definition
  reasons), 45. See also
  budgets; costs
financial arrangements
  (contract components), 287
financial loss reduction
  (project management
  as organization value
  points), 13
financial reports
  (communications
  management), 224
finish dates, 306
five Cs of communication,
  228-229
fixed price (FP) contracts,
  287-289
flexibility
  communications
    management, 229
difference management
  principles, 269
  spreadsheets, budget
    development, 119
flow of information
  (communications
  management), 231
focus
  project manager roles, 22
  project manager success
    tips, 26
  team performance
    principles, 257
follow-up
  communications
    management, 228
  project manager roles, 23
footers and headers
  (document sections)
  managing deliverables, 164
  setting up, 315, 319
forecasts (performance
  reporting), 134
formal signoffs
  change control
    challenges, 156
  project control, 132
formality considerations
  (difference
  management), 274
formality rules (vendor
  management), 281
formalization
  project management
    process groups, 10
  project schedule goals, 101
Format Painter, 310
formatting
  Gantt Bar, 310
  task display, 310
  tasks for reports, 319
FP (fixed price) contracts,
  287-289
frequency (performance
  reporting), 135
Frequently Asked Questions
  (FAQs), communications
  management, 224
functional areas
  (communications
  planning), 227
G
Gantt Bar
  formatting, 310
  hiding/viewing in
    reports, 320
  timescale, adjusting, 310, 320
Gantt charts (project
  schedule
  presentations), 109
gap documentation in
  vendor selection
  process, 340
gatekeepers (managing
  deliverables), 163
general project definition
  checklist, 49
global communication
  trends, demands for project
  managers, 16

How can we make this index more useful? Email us at indexes@quepublishing.com
goals
difference management principles, 269
project definition elements, 46
gold-plating
change control challenges, 156
quality management challenges, 206
good budgets (quality management challenges), 205
good intentions (quality management challenges), 205
good resources, over-allocated (quality management challenges), 205
good schedules (quality management challenges), 205
governance
difference management, 270-271
elements of, 353
in portfolio project management, 352
project management trends, 17
government agencies, demand for project managers, 16
government reports (communications management), 224
granularity (WBS guidelines), 81
graphical form (WBS), 72, 74
graphical indicators, 308-310
adding to reports, 320
graphical schedule summaries (performance reporting), 134
gratitude (communications management), 236
Greenleaf, Robert, 218
group contribution importance (difference management), 271
grouping tasks, 312
growth of PMOs, 350
guilty tones (communications management), 236
H
hard milestone dates (example scenario), 331-333
header and footers (document sections)
managing deliverables, 164
setting up, 315, 319
healthy paranoia, 182
heuristic estimating (work estimation), 90
hiding columns, 319
Gantt Bar in reports, 320
high-maintenance staffs (team performance principles), 264
high-risk projects (work estimation practices), 93-94
historical data
parametric work estimation, 91
work estimation practices, 91-94
history (project definition reasons), 45
holidays (realistic project schedules), 107
honest feedback (project planning), 68
human resources (project management knowledge areas), 11
humble (communications management), 235
identification
change request forms, 153
contract components, 287
issue management systems, 176
quality management principles, 199
WBS objectives, 78
identification data points (issue management), 174
identification numbers (change control), 153
identifying risks, 183
identity management (managing deliverables), 162-163
impact
change control challenges, 156-157
of risks, assessing, 184
impact assessment (change request forms), 153
impact data points (issue management), 174
implementation
post-implementation (change prevention actions), 155
project management key concepts, 9
improper work definition (work estimation reasons), 88-89
improving reports, 318-323
incentives (buyer tips and techniques), 283
industrial experience, skill sets, 23
industry standards (quality management), 197
information flow (communications management), 231
informational needs (communications planning), 228
initiation phase
effort distribution estimation, 90
project management process groups, 10
work estimation accuracy, 92
inserting projects with Copy Picture feature, 311
inspections (quality management principles), 201
instant messaging (communications management), 233
integration
project management knowledge areas, 11
WBS objectives, 79
integrity (change control benefits), 149
iterative processes (budget development importance), 115
interpersonal skills communications management, 235-236
project manager mindset (issue management systems), 173
vendor management, 286
interruptions (communications management), 236
investments, justifying (budget development importance), 115
invoices (vendor management), 285
ISO standards (quality management), 197
issue logs (communications management), 224
issue management systems, 171
administrative process principles, 172
alignment, 172
best practices, 176-177
clear project processes, 174
cost effective approach, 172
documentation, 172
escalation procedures, 174
facilitation, 176
identification, 176
logging systems, 174
central control contacts, 174
collaboration tools, 176
data points, 174-175
databases, 176
disciplined practices, 178
multiple logs, 178
spreadsheets, 176
word processors, 175
proactive project management, 172-173
project control, 128
project manager mindset principles, 173
resolution, 177
reviews, 177
root cause analysis, 177
tracking systems, 172
training systems, 177
vendor management, 281
issue resolution
contract components, 287
difference management (cross-functional projects), 272
recovery activities, 141
issues, definition of, 193
iterations
multiple iterations in testing process, 341
in project management “lite” culture, 330
iterative development in agile project management, 346
quality management, 204
J–K

**judgment (work estimation)**, 91

**judgment attitudes** (communications management), 236

**kickoff meetings**, 248-250
communications management, 224
difference management, 272
team performance principles, 259-260

**knowledge (skill sets)**, 24-25

**knowledge areas (PMI)**, 11-12

**leverage** (project management as organization value points), 13

**leverage exception-based approach** (status reporting), 234

**librarians** (project manager roles), 23

**licensing and fees** (budget development), 118

**lifecycles** (budget development importance), 115

**limited overtime** (shortening project schedules), 108

**linear organization, visual thinking versus**, 357

**listening skills**
active listening, 24
communications management, 229, 235

**location considerations** (communications planning), 227

**logging systems** (issue management), 174
central control contacts, 174
collaboration tools, 176
data points, 174-175
databases, 176
disciplined practices, 178
multiple logs, 178
spreadsheets, 176
word processors, 175

**logical dependencies**, capturing, 316

**logistics**, project definition reasons, 44
logs
change control, 153
project success tools, 39
risk logs, 186

lost productivity, reasons for managing deliverables, 161

management (WBS objectives), 78
management commitment considerations (vendor management), 282
management decisions (work estimation reasons), 89-90
management processes (project control), 128
management style principles (team performance), 257

managers
common mistakes of, 27
demands for, 15-16
inadequate, 33
mindset principles, 173
multiple, 32
responsibilities of, 201
risk management roles, 23
roles of, 22-23
coach, 22-23
facilitator, 22
librarian, 23
organizers, 22
persuader, 22
planners, 22
point-of-contact, 22
problem-solver, 22

resource manager, 22
salesman, 23

skill categories
business management skills, 23
communication, 24
industrial experience, 23
leadership, 24-25
office productivity suite, 23
self-assessments, 25
software skills, 23
technical knowledge, 24

success tips for, 25
calm natured techniques, 26
common mistakes, avoiding, 25
context understanding, 26
customer-service skills, 26
focus, 26
knowledge of skills, 25
mindset considerations, 25
ownership techniques, 25
passion, 26
political techniques, 25
positive attitude techniques, 25
realism techniques, 26
risk analysis, 26
team-oriented approach, 26

managing
change control
alertness, 150
baselines, resetting, 152
buy-ins, 152
challenges, 156-157

Change Control Board, 154
change control systems, 149
change prevention actions, 154-155
change request forms, 152-153
change types, 147
changes, planning for, 149
configuration and organizational management comparisons, 148
contract alignment, 152
defined, 146-147
identification numbers, 153
multiple process paths, 152
over-communication, 150
overview, 145-146
principles, 151
scope changes, minimizing, 149-150
scope creep, 146
spreadsheets, 153
stakeholders, educating, 149
tracking logs, 153
unplanned scope change causes, 150-151

communications, 223
appreciation and gratitude, 228
audio conferencing, 233
central contact assignment, 230
challenges of, 226-227
communication options, 231-233
conflict resolution, 225

How can we make this index more useful? Email us at indexes@quepublishing.com
MANAGING

documentation, 228
email, 225, 233
expectations, 225
face-to-face meetings, 225, 232
five Cs of communication, 228-229
follow-ups, 228
information flow, 231
instant messaging, 233
interpersonal skills, 235-236
meeting practices, 234-235
meetings, 225
message content considerations, 231
naiveness, 229
natural communication strengths, 230
organizational change management areas, 224
planning, 227-228
prioritization, 228
proactive approach, 229
project schedule considerations, 228
push and pull methods, 231
reasons for, 225-226
relationship building techniques, 229
responsibility, 229
stakeholder analysis, 230
standard communication areas, 224
status reporting, 234
team management, 225
technology use, 232
telephone contact, 225, 232
urgent communications, 231
video-conferencing, 232
voice mail, 225, 232
Web conferencing, with audio, 233
deliverables
access control implementation, 163
approval processes, 163
archived files, leveraging, 166
backup procedures, 165
baseline establishment, 164
best practices, 163-166
build/release process, 166
central repository, establishing, 163
challenges, 169
change control system, 160
configuration management, 160, 166-168
CYA (Cover Your Assets), 162
directory structures, 164
file naming conventions, establishing, 164
gatekeepers, defining, 163
identity management, 162-163
protection management, 163
reasons for, 161-162
review processes, 163
revision processes, 163
standard document sections, 164
tracking recommendations, 164-165
tracking systems, 163
version numbering schemes, 164
differences, 267-268
buy-in principles, 268
communication principles, 268-270
cross-cultural projects, 273-274
cross-functional projects, 270-273
expectations, verifying, 270
leadership principles, 269
management efforts, 270
proper planning principles, 268
risk management principles, 268
sponsorship principles, 268
virtual projects, 274-276
well-defined expectation principles, 268
expectations
balancing reality and perception, 241
expectation components, 241-245
importance of, 240
kickoff meetings, 248-250
overview, 239
principles, 245-246
project planning and control elements, 247-248
common problems, 190-192
difference management principles, 268
goals, 181
identifying risk, 183
mitigating risk, 185
monitoring risk, 184-185
principles, 182-183
prioritizing risk, 184
probability of risk factors, 183
probability/impact matrix, 187
project management key concepts, 9
project management knowledge areas, 12
project management roles, 23
project management trends, 17
quality management and, 198
risk assessments, 186
risk control strategies, 192-193
risk logs, 186
risk management plans, 186
risk profiles, 183, 186
risk response options, 186
risk response plans, 187
risk-related terms, 193
sources of risk, 187-190
transference, 186
vendor management, 286
vendors, 279
buyer tips and techniques, 283-285
client organization, 280
contract administrator and project manager conflicts, 282
contract development, 281
contracts, 281-282, 286-289
delivery management, 281
evaluation and selection elements, 281
formality rules, 281
management commitment considerations, 282
management skills, 286
procurement specialists, 279-280
project management essentials, 280-281
relationship management, 281
roles and responsibilities, clarifying, 282
seller organization, 280
seller tips and techniques, 285-286
terms and processed, clarifying, 282
win-win relationship approach, 282
manual resource leveling, 316
marketability experiences (team performance principles), 258
materials (budget development), 118
meetings communications management, 225, 235
agenda preparation, 235
closure, 235
face-to-face meetings, 225, 232
facilitation, 235
meeting minutes, posting, 235
note taking, 235
planning, 234
timing considerations, 235
video conferencing, 232
difference management, 272
kickoff meetings, 248-250
status meetings project control, 131
recovery activities, 141
team performance principles, 259-260
virtual meetings, 275-276
mentoring, 204, 359
message content considerations (communications management), 231
metrics in testing process, 342
Microsoft Project, design fundamentals of, 304-306
milestones charts
project schedule presentations, 109
project success tools, 37
contract components, 287
ongoing project operations, 8
multiple critical paths, disabling, 314
multiple iterations in project management “lite” culture, 330 in project planning, 56 in testing process, 341
multiple schedule versions, 323
multiple schedule views, 322
mutual agreements (contract termination), 298
mutual considerations (legal contracts), 287

N
naiveness (communications management), 229
name data points (issue management), 174
name/identity change (communications management), 224
negative performance index in EVM (Earned Value Management), 138
negativity (communications management), 236
negotiation managing deliverables, 162 vendor management, 286 vendor selection process, 340
network diagrams (project schedule), 104, 110
new team members (team orientation plans), 262
newsletters (communications management), 224 “90% done” phenomenon, 140 90% probability estimate in CCPM, 354 non-disclosure agreements (contract components), 287 non-standard calendars, updating timescales for, 323 non-working days (realistic project schedules), 107 note taking (meeting practices), 235 notebooks (project success tools), 39 Notes field, 315

O
objective project approval process of PMOs, 350 objectives lack of understanding, project manager mistakes, 27 project definition elements, 46
OBS (Organizational Breakdown Structure), 78
office productivity suite, skill sets, 23
one-on-one meetings (communications management), 224 ongoing project operations, 8

How can we make this index more useful? Email us at indexes@quepublishing.com
ONLINE RESOURCES

online resources
  project management resources, 18
  communication management, 224

openness in vendor selection process, 339

operational costs (budget development), 118

operations (projects), ongoing, 8

organization charts
  communications management, 224
  project success tools, 37
  project management key concepts, 9
  project manager roles, 22-23
  project success tips, 30
  WBS guidelines, 80
  WBS objectives, 79

organization updates (project planning), 62, 64

organization value points, 12-13

organizational and configuration change management comparisons, 148

Organizational Breakdown Structure (OBS), 78

organizational change issues (project definition), 47

organizational culture
  communications planning, 228
  project control, 130

organizational impacts (project management challenges), 15

organizational structure (communications planning), 227

orientation plans (team performance principles), 261-262

out-of-scope specifications (project definition elements), 46

outcomes (project and operation comparisons), 9

outline form (WBS), 72

outline view (tasks), 312

outsourcing
  for resource management problems, 334
  for turnover risk, 335
  selection process for (example scenario), 335-340

over-allocating resources, 311
  avoiding with resource leveling, 316-318
  quality management challenges, 205

over-communication (change control), 150

overhead costs (budget development), 118

overtime, limited (shortening project schedules), 108

ownership
  contract components, 287
  deliverable tracker recommendations, 165

success tips, 25

WBS guidelines, 81

Page Setup feature, printing reports, 320

parametric estimating (work estimation), 91

Parkinson’s Law, defined, 355

part-time resources
  adjusting availability in calendars, 307
  realistic project schedules, 107

partial schedules, 98-99

partnership relationships
  vendor management, 284
  vendor selection process, 340

passion (project manager success tips), 26

past experiences (communication challenges), 227

payment schedules (contracts), 287

payments, finalizing (project closure), 295

PBS (Project Breakdown Structure), 78

PDA (Prevention, Detection, and Action), project control principles, 127-128

penalties (contract components), 287
people. See also resource management; team management

performance development, 255
clarity traits, 256
client interaction
preparation, 261
collocation, 260
commitment traits, 256
conflict resolution
techniques, 260
expectation management
principles, 257
expertise, leverage, 260
high-maintenance staffs, 264
high-performing teams, 256
kickoff meetings, 259-260
management style
principles, 257
marketability
experiences, 258
orientation plans, 261-262
planning principles, 257
poor performers, 263
primary strength traits, 258
procedures, setting up, 259
productivity principles, 257-258
professionalism, 256
progress reporting, 259
project repository setup, 261
recognition, 258-259
relationship building
principles, 259
reputation considerations, 264
reward systems, 258-259
risk identification, 264
standards, setting, 260
synergistic traits, 256, 259
task assignment
techniques, 261
team charter
development, 260
team focus, 257
team selection principles,
successful people, 257
team unity rituals, 261
trust levels, 256
undeveloped schedule considerations, 264
resources
adding automatically, 315
assigning, 316, 317, 323, 325
availability, adjusting in calendars, 307
buyer tips and techniques (vendor management), 283
communications planning, 227
incorrect, work estimation reasons, 89
lack of, 33
lack of understanding, project manager mistakes, 27
over-allocating, 311, 316-318
project definition elements, 48
project management, 14, 18
project manager roles, 22
project planning, 58-59, 68
project schedule impacts, 100
project schedule inputs, 101, 103
project success tools, 38
schedule updates (project closure), 295
scheduling software benefits, 105
viewing assignments, 324
WBS guidelines, 80

teams
communications management, 225
project and operation comparisons, 9
project management key concepts, 10
project schedules, quality-based reviews, 109
vendor teams,
integrating, 284

perception, balancing with reality, 241

performance
budget development importance, 114
evaluations (project closure), 296
project control, 133-135
project management key concepts, 9
project planning considerations, 59

How can we make this index more useful? Email us at indexes@quepublishing.com
project schedule impacts, 100  
WBS objectives, 78-79  

**performance development (teams), 255**  
clarity traits, 256  
client interaction preparation, 261  
collocation, 260  
commitment traits, 256  
conflict resolution techniques, 260  
expectation management principles, 257  
extpertise, leverage, 260  
high-maintenance staffs, 264  
high-performing teams, 256  
kickoff meetings, 259-260  
management style principles, 257  
marketability experiences, 258  
orientation plans, 261-262  
planning principles, 257  
poor performers, 263  
primary strength traits, 258  
procedures, setting up, 259  
productivity principles, 257-258  
professionalism, 256  
progress reporting, 259  
project repository setup, 261  
recognition, 258-259  
relationship building principles, 259  
reputation considerations, 264  
reward systems, 258-259  
risk identification, 264  
standards, setting, 260  
synergistic traits, 256, 259  
task assignment techniques, 261  

**team charter development**, 260  
team focus, 257  
team selection principles, successful people, 257  
team unity rituals, 261  
undeveloped schedule considerations, 264  

**performance measurement (contract components), 287**  

**performance reporting (project control), 128**  

**personal value points (project management benefits), 13**  

**personality clashes (example scenario), 333-334**  

**perspectives (communications management), 235**  

**persuasion (project manager roles), 22**  

**PERT charts (work estimation), 91**  

**pessimistic project justifications of PMOs, 351**  

**PgMP (Program Management Professional) certification, 358**  

**phased deployment in agile project management, 346**  

**phased estimating (work estimation), 91**  

**phased implementation for hard milestone dates, 333**  

**physical state (communication challenges), 227**  

**pilot projects of PMOs, 350**  

**plan phase (effort distribution estimation), 90**  

**plan-do-review model in agile project management, 347**  

**planned dates, 306**  

**Planned Value (PV) in EVM (Earned Value Management), 137**  

**planners, 212**  

**planning**  
change control, 149  
communication (project success tools), 37  
communications management, 227-228  
difference management principles, 268  
improper, 33  
lack of (deliverable management challenges), 169  
meeting practices, 234  
plan documents, 36  
project control, 130  
project management key concepts, 9  
project management process groups, 10  
project manager roles, 22  
project success tips, 35  
project success tools, 38  
projects  
acceptance criteria, 60  
all-encompassing document, 57  
budgets, 64  
change control, 65, 67
checklists, 68-69
communications, 66-67
configuration
management, 65, 67
control systems, 65
cost determination
updates, 64
critical issues, 65
deliverables, 58-60, 65
detail planning, 58
fundamental questions,
  58-59
multiple passes, 56
proactive project
management, 57
procurement, 66-67
project organization
updates, 62, 64
purpose principles, 56
quality management, 67
quality standards, 65
RASIC matrix, 61
reasons for, 55-56
resources, 60, 68
responsibility matrix, 67
risk analysis, 68
roles and
responsibilities, 62
rolling wave planning, 56
schedule development,
  61-62
schedules versus, 99
shared information, 60
stakeholder analysis, 57
success factor
considerations, 57
supplemental project plan
components, 66-68
team interaction, 57
team management, 66
validation, 59
variance management, 68
WBS and, 77
work estimation, 61
quality management, 200, 203
risk management plans, 186
risk response plans, 187
team performance
principles, 257
testing process, 341
vendor management, 281
PMI (Project Management
Institute), 10, 358
knowledge areas, 11-12
process groups, 10
project management
defined, 10
PMI Risk Management
Professional (PMI-RMP)
certification, 358
PMI Scheduling Professional
(PMI-SP) certification, 358
PMI special interest group
conferences, 360
PMI-RMP (PMI Risk
Management Professional)
certification, 358
PMI-SP (PMI Scheduling
Professional)
certification, 358
PMO (Project Management
Office), 348-351
scope of, 348-349
traits of successful PMOs,
  349-351
PMP (Project Management
Professional) certification, 16, 358
point men, 213, 230
point-of-contact (project
manager roles), 22
policies (project
definition), 48
political influence in
portfolio project
management, 352
political techniques (success
tips), 25
politics, project definition
reasons, 44
pooled buffers in CCPM, 355
poor performance
difference management, 270
team performance
principles, 263
poor scope statement
(unplanned scope change
causes), 151
Portfolio Project
Management (PPM), 45,
  351-353
positive attitudes (success
tips), 25
positive attributes (team
performance
principles), 258
post-implementation
(change prevention
actions), 155
posting minutes (meeting
practices), 235
potential impacts (difference
management), 274
PPM (Portfolio Project
Management), 45, 351-353
practicality, project definition reasons, 45
pre-allocated budgets (budget development challenges), 121
pre-verification (quality management), 204
preliminary schedules, 103-106
presentations
  communications management, 224
  inserting projects with Copy Picture feature, 311
  project schedules, 109-110
prevention
  project control principles, 127
  quality management practices, 206
Prevention, Detection, and Action (PDA), project control principles, 127-128
principles, reviewing (recovery activities), 141
printing reports, Page Setup feature, 320
priorities
  communications management, 228
  for hard milestone dates, 332
  project closure challenges, 297
  project control, 129
  project success tips, 35
  risks, 184
  tasks, 317-318
  in testing process, 341
priority data points (issue management), 174
proactive approach (communications management), 229
proactive project management
  issue management systems, 172-173
  project planning, 57
probability, determining, 183
probability/impact matrix, 187
problem-solvers, 22, 213
procedures
  managing deliverables, 168
  team performance, 259
process groups (PMI), 10
process improvement technique (shortening project schedules), 108
processes
  buyer tips and techniques (vendor management), 283
  clarifying (vendor management), 282
  configuration management plans, 168
  project control, 129
  quality management, 199
procurement
  project management knowledge areas, 12
  project planning, 66-67
procurement contracts (communications planning), 228
procurement management (project control), 128
procurement specialists (vendor management), 279-280
procurement tasks (budget finalization), 120
procurement team, role in vendor selection process, 337
production environment in testing process, 342
productivity
  difference management, 276
  managing deliverables, 161
  project manager roles, 22
  team performance principles, 257-258
products (quality management), 199
professionalism (team performance), 256
profiles, risk, 183, 186
profit margins, lack of (budget development challenges), 121
program management, portfolio project management versus, 352
Program Management Professional (PgMP) certification, 358
progress
  measurement (project control challenges), 140
  recording, 324
  reporting (team performance), 259
tracking, 34-35
WBS guidelines, 80
progress notes data points
(issue management), 175
progressive elaboration
(project definition), 47
project administration support
of PMOs, 350
project approval process of
PMOs, 350
Project Breakdown Structure
(PBS), 78
project buffers in CCPM, 354
project calendars. See also
schedules
- adjusting resource
availability, 307
- multiple calendars in Microsoft
Project, 305
- nonstandard calendars,
updating timescales for, 323
- realistic project schedules, 107
types of, 306
- working time, setting, 315
Project Definition documents.
See defining projects
project groups (PMI), 10
Project Information dialog
box, 313
project information location
reasons (managing
deliverables), 161
project leadership
- difference management
principles, 269-271
- lack of understanding, project
manager mistakes, 27
- overview, 211-212
project areas requiring
leadership, 214-215
project management as
personal value point, 13
project management key
concepts, 9
in project management
“lite” culture, 329
project management
trends, 17
project success tips, 35
qualities of successful project
leaders, 212-214
servant leadership approach,
218-219
skill sets, 24
team orientation plans, 262
tips and techniques, 215-218

project management. See
also projects
agile approaches, 346-348
CCPM (Critical Chain Project
Management), 353-356
certifications, value of,
358-359
collaboration, 15
communication
obstacles, 14
competing demands,
14-15
cutting edge
demands, 14
estimations, 15
multiple expectations, 14
organizational
impacts, 15
uncharted territory, 14
defined, 8
key concepts, 8-10
mind mapping software,
357-358
online resources, 18
organization value points,
12-13
personal value points, 13
PPM (Portfolio Project
Management), 351-353
scenarios
- hard milestone dates,
331-333
- lack of detailed
scheduling ability,
330-331
- project management
“lite” culture, 328-330
- resource management
problems, 333-334
testing process, 340-343
turnover, handling,
334-335
vendor selection process,
335-340
training for, 359-360
trends in, 16-17
web-based software for,
356-357

project management “lite”
culture (example scenario),
328-330
Project Management
Institute (PMI), 10, 358
knowledge areas, 11-12
process groups, 10
project management
defined, 10
Project Management Office
(PMO), 348-351
scope of, 348-349
traits of successful PMOs,
349-351
Project Management Professional (PMP) certification, 16, 358

project manager reluctance challenges (project control), 139

project managers
common mistakes of, 27
demands for, 15-16
inadequate, 33
mindset principles, 173
multiple, 32
responsibilities of, 201
risk management roles, 23
roles of, 22-23
coach, 22-23
facilitator, 22
librarian, 23
organizers, 22
persuader, 22
planners, 22
point-of-contact, 22
problem-solver, 22
resource manager, 22
salesman, 23

skill categories
business management skills, 23
communication, 24
industrial experience, 23
leadership, 24-25
office productivity suite, 23
self-assessments, 25
software skills, 23
technical knowledge, 24

success tips for, 25
calm natured techniques, 26
common mistakes, avoiding, 25
customer-service skills, 26
domain understanding, 26
focus, 26
knowledge of skills, 25
mindset considerations, 25
ownership techniques, 25
passion, 26
political techniques, 25
positive attitude techniques, 25
realism techniques, 25
risk analysis, 26
team-oriented approach, 26
tools, 36-38

project phase name (deliverable tracker recommendations), 165

project phases in quality schedules, 330

project summary task, viewing, 313

Project, design fundamentals of, 304-306

projects. See also project management
budget development, 113
assumptions, documenting, 116
buffers, 116
cash flow management tool, 115
challenges of, 120-121
comprehension principle, 115
cost estimate models, 119
costs of change, 119
disposal costs, 118
earned value management (EVM), 114
equipment sources, 116
expectation measurements, 115
expenses versus capital, 117
finalization, 120
initial development, 119
investment justification, 115
iterative process principle, 115
labor cost sources, 116
licensing and fees, 118
lifecycle principle, 115
materials, 118
operational costs, 118
overhead costs, 118
performance measurement importance, 114
reasons for, 114-115
spreadsheet approach, 119
time-phased principle, 115
training sources, 118
travel sources, 118
validation importance, 114
communications, 67
controlling
15% Completion Rule, 130
action, 127-128
baselines, 131, 140
change control, 128-129, 139
checkpoints, 132
completion criteria, 131, 140
configuration management, 128
considerations, 126
consistency, 130, 140
detection, 127
eyearly project stage management, 130
escalation thresholds, 133
EVM (Earned Value Management), 136-139
expectations, setting, 130
formal signoffs, 132
issue management, 128
management processes, 128
milestones, 132
organizational culture, 130
overview, 125-126
PDA (Prevention, Detection, and Action), 127-128
performance reporting, 128, 133-135
planning, 130
prevention, 127
priorities, 129
process control, 129
procurement management, 128
progress measurement challenges, 140
project manager reluctance challenges, 139
project scale, 129
quality auditors, 132
quality management, 128
recovery activities, 141
requirements management, 128
requirements traceability challenges, 140
requirements traceability matrix, 132
reviews, 131
risk management, 128
small work packages, 131
status meetings, 131
team connection challenges, 140
time and cost accounting challenges, 139
unidentified work challenges, 140
V method approach, 132
variance responses, 135-136
creating, best practices, 313-316
defining, 8, 49
acceptance checklist, 51
alternative approaches, 47
approach checklist, 51
assumptions, 47
constraints, 47
definition questions/considerations, 44
dependencies, 46
documentation checklist, 51
definition questions/considerations, 44
documentation checklist, 51
financial reasons for, 45
general checklist, 49
goals and objectives, 46
historical reasons for, 45
logistical reasons for, 44
organizational change issues, 47
out-of-scope specifications, 46
Policies and standards, 48
political reasons for, 44
portfolio project management, 45
practical reasons for, 45
progressive elaboration, 47
purpose, 46
recommend project approach, 47
resource estimates, 48
risk checklist, 51
risks, 47
schedule estimates, 48
scope, 46
scope checklist, 50
stakeholders, 47, 50-51
success criteria, 46
supporting document references, 48
validation, 59
visual scope summary, 48
ending, 293, 298
absorption method, 298
cancellations, 298
challenges, 296-297
collapse method, 298
completion method, 298
contract termination, 298
deterioration method, 298
displacement method, 298
lack of closure, 294
official closure signals, 294
personal interaction analogy, 293

How can we make this index more useful? Email us at indexes@quepublishing.com
Project End checklists, 294-296
success criteria, 294
examples of, 8
inserting with Copy Picture feature, 311
leading in project management “lite” culture, 329
operations, ongoing, 8
planning
acceptance criteria, 60
all-encompassing document, 57
budgets, 64
change control, 65, 67
checklists, 68-69
communication plans, 66
cost determination, 64
critical issues, 65
deliverables, 58-60, 65
detail planning, 58
fundamental questions to, 58-59
multiple passes, 56
proactive project management, 57
procurement, 66-67
project organization updates, 62, 64
purpose principles, 56
quality management, 67
quality standards, 65
RASIC matrix, 61
reasons for, 55-56
resource needs, 60, 68
responsibility matrix, 67
risk analysis, 68
roles and responsibilities, 62
rolling wave planning, 56
schedule development, 61-62
schedules versus, 99
shared information, 60
stakeholder analysis, 57
success factor considerations, 57
supplemental project plan components, 66-68
team interaction, 57
team management, 66
validation, 59
WBS and, 77
work estimation, 61
risk management accepting risk, 185
in agile project management, 347
assessing impact of risk, 184
avoiding risk, 185
common problems, 190-192
difference management principles, 268
goals, 181
identifying risk, 183
mitigating risk, 185
monitoring risk, 184-185
principles, 182-183
prioritizing risk, 184
probability of risk factors, 183
probability/impact matrix, 187
project management key concepts, 9
project management knowledge areas, 12
project management roles, 23
project management trends, 17
quality management and, 198
risk assessments, 186
risk control strategies, 192-193
risk logs, 186
risk management plans, 186
risk profiles, 183, 186
risk response options, 186
risk response plans, 187
risk-related terms, 193
sources of risk, 187-190
transference, 186
vendor management, 286
schedules acceptance goals, 101
budget impacts, 100
completeness and quality goals, 100-101
crashing technique, 108
critical path, 103
effort estimation inputs, 101, 103
fast tracking technique, 108
finalization, 104
formalization goals, 101
impact, 98-100
limited overtime technique, 108
network diagrams, 104
partial, 98-99
performance impacts, 100
preliminary, 103, 105-106
presenting, 109-110
process improvement
technique, 108
project planning
versus, 99
quality-based reviews,
108-109
realistic expectations,
103, 106-107
realistic goals, 101
reasons for, 97-98
resource impacts, 100
resource inputs, 101, 103
risk analysis, 101, 104
scheduling software, 105
shortening, 107-109
task inputs, 103
task relationships, 101-105
team-based approach, 106
walk-throughs, 104,
108-109
WBS inputs, 101
what-if analysis, 100
sending, challenges, 297
success tips
acceptance criteria, 30
achieved purpose, 30
agreement, 35
alignment, 35
budgets, completed
within, 30
collaboration, 35
communication, 35
completed on time, 30
customer expectation, 35
decision points, 30
delivered as promised, 30
expectations, realistic, 35
learning from successful
projects, 34-36
learning from troubled
projects, 31-34
leadership, 35
management tools, 36-39
organization, 30
planning, 35
priorities, 35
progress tracking, 35
quality, 30, 35
risk analysis, 36
schedules, 35
scope, 35
skill sets, 36
stakeholder
acceptance, 30
stakeholder expectations,
meeting, 35
support, 35
universal harmony, 30
win-win relationship
approach, 31
variance management, 68
promotion from within for
handling turnover risk, 335
project planning, 56
project success tips, 30
push and pull methods
(communications
management), 231
PV (Planned Value) in
EVM (Earned Value
Management), 137
QA audits, 193
quality
auditors, 132
managing
acceptance criteria, 206
agile development, 204
audits, 201-202
challenges, 205-206
checklists, 201
communication, 206
completion criteria, 202
computer simulation, 204
customer focus, 206
customer-focused
principles, 200
customer-focused project
approaches, 203-204
expectations, setting, 200
identification
principles, 199
industry standards, 197
inspections, 201
iterative
development, 204
mentor relationships, 204
overview, 198
planning principles, 200
PMI definition of, 198
pre-verification, 204
How can we make this index more useful? Email us at indexes@quepublishing.com
prevention, 206
process focus on, 199
product focus on, 199
project management
trends, 17
project manager
responsibilities, 201
project planning, 67
prototyping approach, 204
QFD (Quality Function
Deployment), 204
Quality Management
Plan, 203
rational unified
processing, 204
requirements focus
on, 199
requirements traceability
matrix, 201
reviews, 201
risk management
and, 198
scenario development, 204
scope focus, 206
skilled resources/high-
performing teams, 206
small work packages,
202, 206
standards, 202
storyboarding
approach, 204
success factors, 200
testing cycles, 201
V method, 202
value-added
requirements, 199
verification focus on, 199
verification principles, 200
project control, 128
project management
challenges, 14
project management key
concepts, 9
project management
knowledge areas, 11
project planning
considerations, 59
project schedule goals,
100-101
project success tips, 30, 35
project success tools, 38
quality assurance (vendor
management), 284
quality enhancements
(vendor management), 284
quality schedules, detailed
schedules versus, 330-331
quality standards (project
planning), 65
quality-based reviews
(project schedules), 108-109
question asking
interpersonal skills,
communications
management, 236
project planning, 58-59
realistic expectations
project schedules, 101,
103, 106
resource allocation, 107
project success tips, 35
reality, balancing with
perception, 241
rebuilding resource
assignments, 325
recognition
project management as
personal value points, 13
team performance principles,
258-259
recommended project
approach (project definition
elements), 47
reconciliation (budget
finalization), 120
recording progress, 324
recovery activities
baselines, resetting, 141
clarity, communication, 141
discussed, 141
increased accountability and
visibility, 141
issue resolution, 141
managing deliverables, 161
planning principles,
reviewing, 141
status meetings, 141
references/referrals (project
closure), 296
refinement (WBS
guidelines), 81
regulatory issues (managing
deliverables), 162
R
RASIC matrix (project
planning), 61
rational unified processing
(quality management), 204
RBS (Resource Breakdown
Structure), 78
readiness checkpoints in
testing process, 342
realism (success tips), 26

R
related terms (configuration and organizational management comparisons), 148

related terms data points (issue management), 175

relationships
in agile project management, 347
communications management, 229
interpersonal skills, communications management, 236
in project management “lite” culture, 328-329
team performance, 259
vendor management, 281

release process (managing deliverables), 166

reporting
configuration management plans (managing deliverables), 168
performance (project control), 128, 133-135
in portfolio project management, 352
status reporting, 37, 234

reports
customizing, 321
improving, 318-323
printing (Page Setup feature), 320

repository plans (managing deliverables), 168

repository setup (team performance principles), 261

reputations (team performance principles), 264
requestor information (change request forms), 153
requests (change control principles), 152
requirements
change prevention actions, solid requirements definition, 154
defining for cross-functional projects, 272-273
lack of understanding, project manager mistakes, 27
managing, 128, 250-253
quality management, 199
unplanned scope change causes, 151
requirements documents (project success tools), 36
requirements traceability matrix (RTM), 253
project control, 132, 140
quality management tools, 201
reserve time (work estimation practices), 94
resilience, 217
resolution
issue management systems, 177
lack of understanding, project manager mistakes, 27
recovery activities, 141

resource allocation of PMOs, 351
realistic project schedules, 107
work estimation practices, 93

Resource Breakdown Structure (RBS), 78

resource buffers in CCPM, 354

resource calendars, 306

resource dependencies (vendor management), 285

resource estimation
WBS objectives, 78
work estimation reasons, 89

resource leveling, 316-318
realistic project schedules, 107
scheduling software benefits, 105

resource management. See also team management
in CCPM, 354
in portfolio project management, 352
problems (example scenario), 333-334
turnover, handling (example scenario), 334-335

resource needs (project planning), 60

resources
adding automatically, 315
assigning, 316
rebuilding assignments, 325
to summary tasks, 317, 323
availability, adjusting in calendars, 307
buyer tips and techniques (vendor management), 283
communications planning, 227
incorrect, work estimation reasons, 89
lack of, 33
lack of understanding, project manager mistakes, 27
over-allocating, 311
avoiding with resource leveling, 316-318
project definition elements, 48
project management, 14, 18
project manager roles, 22
project planning, 58-59, 68
project schedule impacts, 100
project schedule inputs, 101, 103
project success tools, 38
schedule updates (project closure), 295
scheduling software benefits, 105
viewing assignments, 324
WBS guidelines, 80
respect, earning, 216
response options (risk management), 185-186
responsibilities
  communication, difference management, 270
  communications management, 229
  configuration management plans (managing deliverables), 168
difference management, 270
of PMO (Project Management Office), 348-349
project planning, 62
vendor management, 281-282
responsibility matrix
  project planning, 67
  project success tools, 37
responsiveness (difference management), 275
results-orientation in agile project management, 347
resumes, updating (project closure), 295-296
review processes
  communications management, 224
default settings, 314-315
issue management systems, 177
managing deliverables, 163
project control, 131
project schedules, 108-109
quality management principles, 201
recovery activities, 141
vendor management, 285
reward systems
  buyer tips and techniques, 283
team performance principles, 258-259
right project approach (change prevention actions), 155
risk analysis. See also risk management
communications planning, 228
lack of (quality management challenges), 206
performance reporting, 134
proactive project management, 57
project control, 128
project definition checklist, 51
project definition elements, 47
project manager success tips, 26
project planning, 68
project schedules, 101, 104
project success tools/tips, 36-38
WBS objectives, 79
work estimation, 88-89, 93
risk assessments, 186
risk factor methods (work estimation), 92
risk factors (variance responses), project control, 135
risk identification (team performance principles), 264
risk level, scaling vendor selection process to, 336-337

risk logs, 186, 224

risk management
  accepting risk, 185
  in agile project management, 347
  assessing impact of risk, 184
  avoiding risk, 185
  common problems, 190-192
  difference management principles, 268
  goals, 181
  identifying risk, 183
  mitigating risk, 185
  monitoring risk, 184-185
  principles, 182-183
  prioritizing risk, 184
  probability of risk factors, 183
  probability/impact matrix, 187
  project management key concepts, 9
  project management knowledge areas, 12
  project management roles, 23
  project management trends, 17
  quality management and, 198
  risk assessments, 186
  risk control strategies, 192-193
  risk logs, 186
  risk management plans, 186
  risk profiles, 183, 186
  risk reduction (vendor management), 283-284
  risk response plans, 187
  risks
    lack of understanding, project manager mistakes, 27
    project manager mindset (issue management systems), 173
    project planning considerations, 59
  roadshows (communications management), 224
  role responsibility matrix (communications management), 224
  roles and responsibilities
    communication, difference management, 270
    configuration management plans (managing deliverables), 168
    project planning, 62
    vendor management, 281-282
  rolling wave planning (project planning), 56
  root cause analysis (issue management systems), 177
  RTM (requirements traceability matrix), 253
  project control, 132, 140
  quality management tools, 201
  rule-of-thumb estimating (heuristic estimation), 90
  rush jobs (project closure challenges), 296

S

salesmen, 23, 213
saving baseline dates, 324
scale (project control), 129
scenario development (quality management), 204
scenarios
  hard milestone dates, 331-333
  lack of detailed scheduling ability, 330-331
  project management “lite” culture, 328-330
  resource management problems, 333-334
  testing process, 340-343
  turnover, handling, 334-335
  vendor selection process, 335-340
schedule changes, capturing impacts of, 324
schedule completion date (deliverable tracker recommendations), 165
schedule performance in EVM (Earned Value Management), 136
Schedule Performance Index (SPI) in EVM (Earned Value Management), 137

How can we make this index more useful? Email us at indexes@quepublishing.com
Schedule Variance (SV) in EVM (Earned Value Management), 137

schedules. See also calendars
acceptance goals, 101
baselines, setting, 312-313
budget impacts, 100
in CCPM, 354
change control principles, 152
communication, difference management, 270
communications management, 228
completeness and quality goals, 100-101
critical path, 103
dates
constraints on, 305
planned versus actual versus baseline, 306
detailed schedules
in agile project management, 346
lack of (example scenario), 330-331
developing (project planning), 61-62
effort estimation inputs, 101-103
finalization, 104
formalization goals, 101
impacts, 98-100
lack of understanding, project manager mistakes, 27
multiple versions of, 323
multiple views of, 322
network diagrams, 104
partial, 98-99
performance impacts, 100
preliminary, 103-106
presenting, 109-110
project closure, 295
project definition elements, 48
in project management “lite” culture, 329
project planning versus, 99
project success tools/tips, 35-37
quality-based reviews, 108-109
realistic expectations, 103, 106
calendar alignment, 107
resource allocation, 107
realistic goals, 101
reasons for, 97-98
resource impacts, 100
resource inputs, 101, 103
risk analysis, 101, 104
scheduling software, 105
shortening, 107-109
crashing technique, 108
fast tracking technique, 108
limited overtime technique, 108
process improvement technique, 108
task duration, determining, 305
task inputs, 103
task relationships, 101-105
team orientation plans, 261
team-based approach, 106
undeveloped (team performance techniques), 264
walk-throughs, 104, 108-109
WBS and, 77
guidelines, 80
inputs, 101
what-if analysis, 100
work estimation, 86

scope
change control, 149-151
lack of, 34
lack of understanding, project manager mistakes, 27
of PMO (Project Management Office), 348-349
project definition checklist, 50
project definition elements, 46-47
project management challenges, 14
project management key concepts, 9
project management knowledge areas, 11
project success tips, 35
quality management plans, 203
quality management practices, 206
visual summary (project definition elements), 48

scope creep, defined, 146
scope management for hard milestone dates, 332

scope statements (contract components), 287

scoring in vendor selection process, 338-339

scripts in testing process, 341
security agreements (contract components), 287
selection process for vendors (example scenario), 335-340
self-assessments (skill set categories), 25
self-control, 218, 236
seller organization (vendor management), 280
seller tips and techniques (vendor management), 285
acceptance criteria, 285
communication management, 286
invoice control, 285
resource dependencies, 285
review processes, 285
sign-offs, 285
trust and confidence, 286
senior management support of PMO, 350
The Servant as Leader (Greenleaf), 218
servant leadership approach, 218-219, 269
shared information (project planning), 60
shortening project schedules, 107-109
  crashing technique, 108
  fast tracking technique, 108
  limited overtime technique, 108
  process improvement technique, 108
sign-offs
  change control challenges, 156
change prevention actions, 154
managing deliverables, 161
project control, 132
protection management, 163
vendor management, 285
signatures
  difference management (cross-functional projects), 273
  legal contracts, 287
simulations, 359
skill categories
  business management, 23
  communication skills, 24
  industrial experience, 23
  leadership, 24
  office productivity suite, 23
  project management as personal value points, 13
  project planning considerations, 58
  project success tips, 36
  self-assessments, 25
  software skills, 23
  technical knowledge skills, 24
  unsuccessful project considerations, 25
skilled resources (quality management practices), 206
software, scheduling, 105
software skills, 23
sources of project risk, 187-190
SPI (Schedule Performance Index) in EVM (Earned Value Management), 137
sponsorship
  difference management, 268-271
  lack of, 32
  vendor management, 281
spreadsheets
  budget development, 119
  change control, 153
  issue management logging systems, 176
staffing resources
  adding automatically, 315
  assigning, 316
  rebuilding assignments, 325
to summary tasks, 317, 323
availability, adjusting in calendars, 307
buyer tips and techniques (vendor management), 283
communications planning, 227
incorrect, work estimation reasons, 89
lack of, 33
lack of understanding, project manager mistakes, 27
over-allocation, 311
  avoiding with resource leveling, 316-318
How can we make this index more useful? Email us at indexes@quepublishing.com
project definition elements, 48
project management, 14, 18
project manager roles, 22
project planning, 58-59, 68
project schedule impacts, 100
project schedule inputs, 101, 103
project success tools, 38
schedule updates (project closure), 295
scheduling software benefits, 105
viewing assignments, 324
WBS guidelines, 80

stakeholder acceptance (project management as organization value points), 13

stakeholder analysis
communications management, 230
communications planning, 227
project planning, 57-59
WBS guidelines, 79-81

stakeholder confidence (difference management principles), 269

stakeholder engagement (change prevention actions), 155

stakeholders
buy-in, lack of, 32
defined, 13
educating (change control), 149
expectations, managing
balancing reality and perception, 241
expectation components, 241-245
importance of, 240
kickoff meetings, 248-250
overview, 239
principles, 245-246
project planning and control elements, 247-248
project success tips, 35
requirements management, 250-253
needs, adapting to (performance reporting), 135
project definition checklist, 50-51
project definition elements, 47
quality-based reviews with project schedules, 109
standard document sections (managing deliverables), 164
standardization in PMOs, 350
standards
project definition, 48
quality management, 197, 202
team performance principles, 260
start dates
planned versus actual versus baseline, 306
setting, 313
statistical data (parametric work estimation), 91
status data points (issue management), 174
status information (change request forms), 153
status meetings
project control, 131
recovery activities, 141
status name (deliverable tracker recommendations), 165
status reports
communications management, 224, 234
project success tools, 37
stoplight indicators (performance reporting), 134
storyboarding (quality management approach), 204
strength traits (team performance principles), 258
student syndrome, defined, 355
subject matter expert (SME), work estimation, 91
submission by data points (issue management), 174
success criteria
change control principles, 152
ending projects, 294
performance reporting, 134
project definition elements, 46
project planning, 57
quality management principles, 200
team performance principles, 263
vendor management, 281
success tips
- project managers, 25
  - calm natured techniques, 26
  - common mistakes, avoiding, 25
  - context understanding, 26
  - customer service skills, 26
  - focus, 26
  - knowledge of skills, 25
  - mindset considerations, 25
  - ownership techniques, 25
  - passion, 26
  - political techniques, 25
  - positive attitude techniques, 25
  - realism techniques, 26
  - risk analysis, 26
  - team-oriented approach, 26
- projects, 30
  - acceptance criteria, 30
  - achieved purpose, 30
  - agreement, 35
  - alignment, 35
  - budgets, completed within, 30
  - collaboration, 35
  - communication, 35
  - completed on time, 30
  - customer expectations, 35
  - decision points, 30
  - delivered as promised, 30
  - expectations, realistic, 35
  - leadership, 35
  - learning from successful projects, 34-36
  - learning from troubled projects, 31-34
  - management tools, 36-39
- organization, 30
- planning, 35
- priorities, 35
- progress tracking, 35
- quality, 30, 35
- risk analysis, 36
- schedules, 35
- scope, 35
- skill sets, 36
- stakeholder acceptance, 30
- stakeholder expectations, meeting, 35
- support, 35
- universal harmony, 30
- win-win relationship approach, 31

successful performance (contract termination), 298

summaries
- interpersonal skills, communications management, 236
- performance reporting, 134
- project success tools, 38

summary tasks, assigning resources to, 317, 323

supplemental project plan components, 66-68

support
- lack of, 31
- project success tips, 35

supporting document references (project definition elements), 48

SV (Schedule Variance) in EVM (Earned Value Management), 137

target approval date (deliverable tracker recommendations), 165

target audience (communications management), 229

target due date data points (issue management), 175

target reports (status reporting), 234

targeted work product (deliverable tracker recommendations), 165

targets (configuration management plans), 165

task assignments (difference management), 270

task calendars, 306

task duration
determining, 305
entering, 316

task relationships (project schedule inputs), 101, 103-105

tasks
- assigned resources, viewing, 324
assignment techniques (team performance principles), 261
cost violations, viewing, 314
disabling autolinking, 314
display formatting, 310
filtering, 312
formatting for reports, 319
formatting within tasks, 312
Notes field, 315
outline view, 312
prioritizing, 317-318
project planning considerations, 58
project schedule inputs, 103
project schedules versus WBS, 77
project summary task, viewing, 313
recording progress, 324
summary tasks, assigning resources to, 323
viewing
level of detail, determining, 312
in reports, 319
WBS guidelines, 80-81
teachers, 218
team charter development (team performance principles), 260
team connection (project control challenges), 140
team consensus (work estimation methods), 92
team development (WBS guidelines), 80
team interaction (project planning), 57

team management. See also resource management
for hard milestone dates, 332
project planning, 66
team performance
quality management practices, 206
WBS objectives, 79
team rule establishment (difference management), 275
team-based schedule development approach (project schedules), 106
team-oriented approach (success tips), 26
teams
communications management, 225
performance development, 255
cost clarity traits, 256
cost client interaction preparation, 261
cost collocation, 260
cost commitment traits, 256
cost conflict resolution techniques, 260
cost expectation management principles, 257
cost expertise, leverage, 260
cost high-maintenance staffs, 264
cost high-performing teams, 256
cost kickoff meetings, 259-260
management style principles, 257
marketability experiences, 258
orientation plans, 261-262
project planning principles, 257
poor performers, 263
primary strength traits, 258
procedure, setting up, 259
productivity principles, 257-258
professionalism, 256
progress reporting, 259
project repository setup, 261
recognition, 258-259
relationship building principles, 259
reputation considerations, 264
reward systems, 258-259
risk identification, 264
standards, setting, 260
synergistic traits, 256, 259
task assignment techniques, 261
team charter development, 260
team focus, 257
team selection principles, successful people, 257
team unity rituals, 261
trust levels, 256
undeveloped schedule considerations, 264
project and operation comparisons, 9
project management key concepts, 10
project schedules, quality-based reviews, 109
vendor teams, integrating, 284

**technical difficulties, unforeseen**, 34

**technical skill sets**
knowledge skills, 24
project management as personal value points, 13

**technology**
communications management, 232
communications planning, 228
overhead costs (budget development), 118
shifts (unplanned scope change causes), 150

**telephone contact**
(communications management), 225, 232

**terminating contracts**, 298

**terminology development**
(difference management), 269

**terms, clarifying** (vendor management), 282

**testing**
multiple phases (quality management challenges), 205
prioritizing for hard milestone dates, 332
project control, 131
quality management principles, 201
time ranges (work estimation practices), 93
time zones (difference management)
cross-cultural projects, 273
virtual projects, 276
time-phased principle 
(budget development importance), 115
timeboxing in agile project management, 347
timescales
adjusting, 310, 320
label formats, changing, 323
updating for nonstandard calendars, 323

**timetable dates** (contract components), 287

**timing**
meeting practices, 235
of vendor selection process, 339

timing management (project management knowledge areas), 11
title page (document sections), managing deliverables, 164
tolerance levels (escalation thresholds), 133
tonality (communications management), 236
tool difficulties (deliverable management challenges), 169

**tools**
configuration management plans, 168
project manager, 36-38
risk management tools, 186-187

**traceability**
change prevention actions, 154
quality management tools, 201

**tracking**
managing deliverables, 161
in project management “lite” culture, 329
requirements traceability matrix, 132

**tracking systems**
change control, 153
issue management systems, 172
managing deliverables, 163-165

---

How can we make this index more useful? Email us at indexes@quepublishing.com
training
budget development, 118
issue management systems, 177
for project management, 359-360
project planning considerations, 59
transference (risk management), 186
transition period for handling turnover risk, 335
transition plans, lack of (project closure challenges), 297
travel sources (budget development), 118
trends in project management, 16-17
triple constraint of project management, 15
troubled projects
learning from, 31-34
WBS guidelines, 82
trust
earning, 216
team performance, 256
vendor management, 286
turnover, handling (example scenario), 334-335

undetected risks, 190
undeployed schedule considerations (team performance principles), 264
unidentified work (project control challenges), 140
unity rituals (team performance principles), 261
universal harmony (project success tips), 30
unstated expectations (difference management), 273
unsuccessful project considerations, skill set categories, 25
updating timescales for non-standard calendars, 323
urgent messages (communications management), 231
value-added deliverables of PMOs, 350
in project management “lite” culture, 329
value-added requirements (quality management), 199
values and beliefs (communication challenges), 227
variance management (project planning), 68
variance responses (project control)
baselines, resetting, 136
corrective actions, 135
project cancellation, 136
risk factors, logging, 135
vendor selection process
example scenario, 335-340
project management trends, 16
vendors, managing, 279
buyer tips and techniques, 283-285
client organization, 280
contract administrator and project manager conflicts, 282
contract development, 281
contracts, 281-282, 286-289
delivery management, 281
evaluation and selection elements, 281
formality rules, 281
management commitment considerations, 282
management skills, 286
procurement specialists, 279-280
project management essentials, 280-281
project management trends, 16
relationship management, 281
roles and responsibilities, clarifying, 282
seller organization, 280
seller tips and techniques, 285-286
terms and processes, clarifying, 282
win-win relationship approach, 282

verbal communications (vendor management), 286

verification communications management, 229
pre-verification, 204
quality management, 199-200

version control (project planning considerations), 59
version numbering schemes deliverable tracker recommendations, 165
managing deliverables, 164

video-conferencing (communications management), 232

viewing assigned resources, 324
constraint violations, 314
Gantt Bar in reports, 320
over-allocated resources, 311
project summary task, 313
tasks level of detail, determining, 312
in reports, 319
WBS field, 311
views, multiple views of schedules, 322
virtual projects (difference management), 274
communication methods, 276
face-to-face interaction, 275
productivity verification, 276
responsiveness, 275
team rule establishment, 275
time zone references, 276
virtual meetings, 275-276
virtual teams (project management trends), 17
virtual training, 360
visibility, increased (recovery activities), 141
visual aids (status reporting), 234
visual indicators, 308-310
adding to reports, 320
visual scope summary (project definition elements), 48
visual thinking, linear organization versus, 357
voice mail (communications management), 225, 232

WBS (work breakdown structure)
BOM (Bill of Materials), 78
buyer tips and techniques (vendor management), 283
change prevention actions, 155
clarification, 74-75
CWBS (contractual WBS), 78
defined, 72
development process, 79
guidelines, 80-81
work decomposition process, 79-80
graphical form, 72, 74
objectives, 78-79
OBS (Organizational Breakdown Structure), 78
outline form, 72
PBS (Project Breakdown Structure), 78
project planning and, 77
project schedules, 77
inputs, 101
presentations, 110
versus WBS, 77
RBS (Resource Breakdown Structure), 78
when to stop, 82
work estimation, 75-76

WBS detail in quality schedules, 330
WBS field, viewing, 311
weak foundation (budget development challenges), 120
weaknesses, compensating for, 218
Web conferencing, with audio (communications management), 233
Web sites
  project management resources, 18
  communication management, 224
web-based project management software, 356-357
weekends (realistic project schedules), 107
weighted averages (work estimation), 91
what-if analysis (project schedule impacts), 100
win-win relationships
  project success tips, 31
  vendor management, 282
word processors (issue management logging systems), 175
work breakdown structure (WBS)
  BOM (Bill of Materials), 78
  buyer tips and techniques (vendor management), 283
  change prevention actions, 155
clarification, 74-75
  CWBS (contractual WBS), 78
defined, 72
development process, 79
guidelines, 80-81
work decomposition process, 79-80
graphical form, 72, 74
objectives, 78-79
OBS (Organizational Breakdown Structure), 78
outline form, 72
PBS (Project Breakdown Structure), 78
project planning and, 77
project schedules, 77
  inputs, 101
  presentations, 110
  versus WBS, 77
RBS (Resource Breakdown Structure), 78
when to stop, 82
work estimation, 75-76
work hours (realistic project schedules), 107
work packages
  in EVM (Earned Value Management), 137
  quality management practices, 202, 206
work products in project management “lite” culture, 329
workflow processes
  change control principles, 152
  difference management, 272
working time, setting in project calendar, 315
written communications (vendor management), 286