

This book uses PMBOK as a reference. PMBOK stands for Project Management Body of Knowledge, which is an international standard. It can be applied to a wide range of projects, including construction, manufacturing, and software development. However, PMBOK is too much for some projects. This book simplifies PMBOK and provides some forms to manage projects easily.

PMBOK - 9 knowledge Areas and 42 Processes -

	Initiation	Planning	Executing	Monitorin and Controlling	Closing
Integration	Develop Project Charter	Develop Project Management Plan	Direct & Manage Project Execution	Monitor & Control Project Work Integrated Change Control	Close Project or Phase
Scope		Collect Requirements Define Scope Create Work Breakdown		Verify Scope Control Scope	
Time		Define Activities Sequence Activities Estimate Activity Resources Estimate Activity Durations Develop Schedule		Control Schedule	
Cost		Estimate Costs Determine Budget		Control Costs	
Quality		Plan Quality	Perform Quality Assurance	Perform Quality Control	
HR		Develop Human Resources Plan	Acquire Project Team Develop Project Team	Manage Project Team	
Communications	Identify Stakeholders	Plan Communications	Distribute Information	Report Performance Manage Stakeholder Expectations	
Risk		Plan Risk Management Identify Risks Perform Qualitative Risk Analysis Perform Quantitative Risk Plan Risk Responses		Monitor and Control Risks	
Procurement		Plan Procurements	Conduct Procurements	Administer Procurements	Close Procurements

Use

1. Planning Phase

(Initiation and Planning)

1-1. Identify Stakeholders

Identify those who may affect the project: User, Client, Audience, Funder, Sponsor, Supplier, Supervisor, Manager and so on.
Then, collect their requirements and consider their impact.

Stakeholder Name	Their requirement or Impact on project

1-2. Define Scope

Define objectives and outputs **as concrete as possible**. Refer to the result of process1-1.

(*1) You can fill those items after process 1-3 and 1-4.

[Project Scope Statement]

Project Name	
Project Duration (*1)	
Project Budget (*1)	
Project Objectives	
Project Outputs	

1-3. Create Work Breakdown Structure (WBS)

Use attached “WBS”

1-3-1. Identify the activity which is necessary for completing the project.

Break down the activity into details as much as possible.

1-3-2. Consider a sequence of those activities, and fill in WBS.

1-3-3. Estimate the resources (human resource or skill, materials, etc) which is necessary for each activity, and fill in “in charge”

If you have not gotten the appropriate staff yet, fill in the role name.

1-3-4. Estimate the duration to complete each activity, and fill in “Planned Starting Date” and “Planned End Date”.

1-4. Determine Budget

Estimate costs of each activity in WBS and determine the budget.

Wage, Material cost, Outsourcing cost and so on

1-5. Plan Quality

Define the quality criteria of each output of the project. Refer to the result of process 1-1 and 1-2.

- What satisfies your customers and stakeholders?
- What contributes to your business?



Quality criteria must be **measurable**.

- Example (Not good): Customers satisfy our catering service
- Example (Good): 80% of customers satisfy following items. Taste, Delivery time, Booking process

Make quality assurance (Review, Test plan) at same time. We can check quality for the first time by testing.

Test not only the outputs but also the procedure of making.

- Conduct several tests in the middle of procedure.
- Conduct several tests at the end of procedure.

To enhance quality, **third person's view** is helpful.

Producer's subjectivity is insufficient for quality control.

- Conduct several tests using third persons view.

1-6. Develop Human Resource Plan

Make the organization chart and **clarify the responsibilities** of each person.

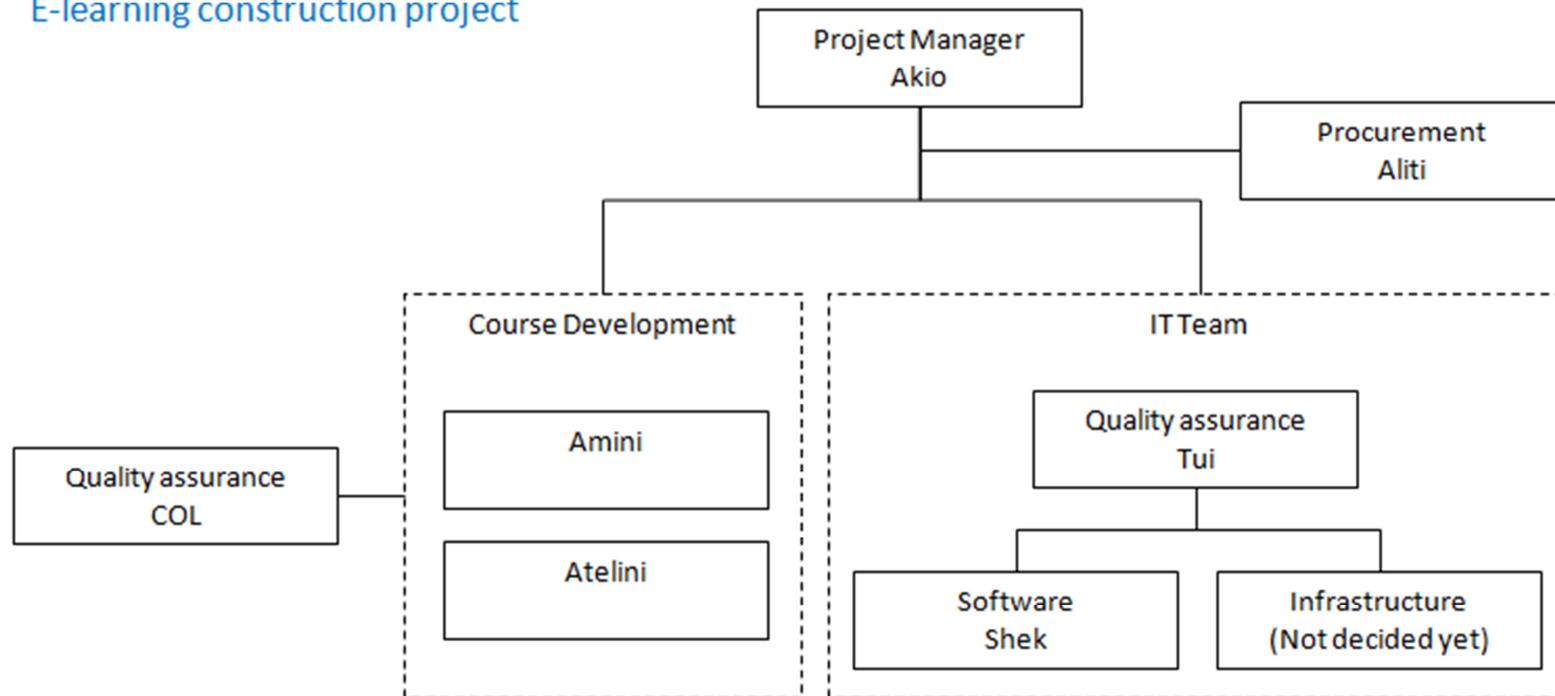
Assign leaders who will monitor and control each department or each work area.

<Sample>

For example, Tui is in charge of the overall quality of the IT system.

In the event that Shek commits a mistake, Tui will be held responsibility for it.

E-learning construction project



1-7. Plan Communications

Decide how to communicate **with all stakeholders**. Not only your boss or subordinate.

- For whom, What kind of information, How frequent...

Project manager has the responsibility of notifying the appropriate people with necessary information.

- Staff in the work site must know the requirements of stakeholders and must implement them.

Make an **early-warning system** in project, because unexpected events also happen in the project.

- Project manager must discover barriers or defects as early as possible and cope with them. So, bottom up information is very important.

Conduct regular meeting frequently. Moreover, flexibly share information as needed.

- Progress
- Barriers and Defects
- Changes, Risks, etc

<Sample>

Communication Method	Detail
Regular progress meeting	Hold meeting in the conference room B at 3:00 every day. All project members except purchasing department should attend this. Confirm progress and update WBS.
Regular user meeting	Hold meetings every Monday. Project manager and leaders of each department should attend this. Record the minutes of all the topics that were addressed in the meeting.
Share information of changes	If changes of user requirement happened, hold urgent meeting asap. If specification change is decided, share the information with stakeholders by email asap. At least project manager and Mr.Toood should be informed about all changes. Project manager should record the change in a Change management sheet.

[Communication Management Plan]

Communication Method	Detail

1-8. Plan Risk Response

1-8-1. Identify the risks.

Imagine and discover risks that may negatively affect the project.

From a viewpoint of

- Cost, Quality, Deadline, Technical, Political, Environmental...

1-8-2. Plan Risk Response

4 strategies against risks

- Avoidance; Eliminate the threat posed by a risk.
 - Change the project plan
 - Isolate project objectives from its impact
 - Relax time, cost, scope and quality
 - Cut scope
- Mitigation; Reduce in the probability or impact of a risk.
 - Adopt less complex processes
 - Conduct more tests
 - Use stable supplier
- Transfer; Shift or share a risk to a third party. Insurance, outsourcing, etc,
- Acceptance; Accept or retain consequences.

2. Monitoring Phase

(Executing, Monitoring and Controlling)

What is Monitoring?

Some people have wrong knowledge about the project.

In the project, unexpected events often occur, and doesn't go according to plan.

Many researches have proved it.

So, just waiting is not called Monitoring.

Project manager must always grasp situation and lead in the right direction.

- Collect various information aggressively
- Handle problems as soon as possible

2-1. Distribute Information

Many statistics indicate that project will fail if you disregard information sharing.

Conduct your communication plan without failure (refer to 1-7).

Don't wait for the information to arrive. **Collect information aggressively.**

Mere oral communication is not enough.

Have some records about the information.

2-2. Change control

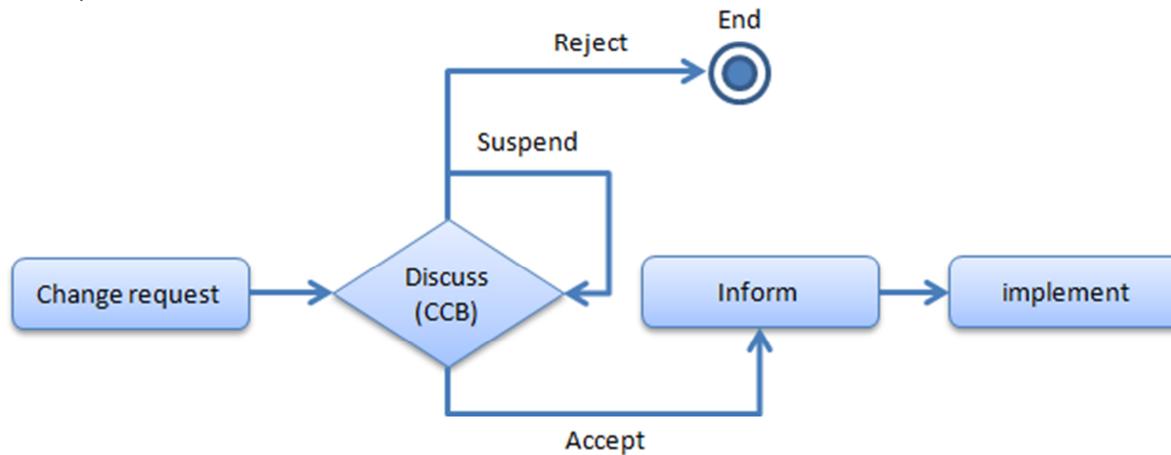
In a project, various changes will occur.

- A change of user or client requests
- A change made by the constraints or technical problems

A certain change might affect greatly to the project, and generate risks of delay or over budget. So, **changes should be managed.**

Establish a process which includes Change Control Board (CCB).

<Sample>



2-3. Control Schedule

Check WBS regularly in accordance with communication plan.

Compare the planned date and actual date.

If progress is behind schedule, **discover the cause of delay and cope with it.**

- Collect information aggressively and discover a delay as fast as possible.

People hesitate to inform about their failure and delay. Just waiting is a worst attitude as a project manager.

- Identify the cause of the delay.

- Cope with the delay.

-- Try to remove barrier

-- Increase human resources or replace a person in charge

-- Change the way of implementation

-- Change the plan (Refer to 2-2)

2-4. Perform Quality Control

Conduct tests using Quality Metrics (Refer to 1-5).

To assure quality of outputs, test is the only method that we can use.

- Conduct several tests in the middle of procedure.
- Conduct several tests at the end of procedure.
- Conduct several tests using third persons view

If there is something unsatisfied, improve the way of implementation.

- Tools, Materials, Process ...

2-5. Monitor and Control Risks

Check the Risk Management Plan (Refer to 1-8) on regular basis.

In a project, various kind of risk will often occur.

- Delay, Defect, Barrier, Conflict ...

If a risk occurred, write it down into Risk Management Plan, and make a plan on how we treat it (Refer to 1-8).

Share information and **track** the changes of the state.

To find new risks, early-warning system is very useful (Refer to 1-7).