

was helping the project team get to know each other. The "Ask the Expert" feature must be user-friendly and capable of soliciting questions and immediately acknowledging that the question has been received in the proper format. The feature must also be capable of forwarding the question to the appropriate expert (as maintained in the system's expert database) and capable of providing the status of questions that are answered. The system must also allow for payment for advice, if appropriate.

7. Security: The intranet site must provide several levels of security. All internal employees will have access to the entire intranet site when they enter their security information to access the main, corporate intranet. Part of the intranet will be available to the public from the corporate Web site. Other portions of the intranet will be available to current clients based on verification with the current client database. Other portions of the intranet will be available after negotiating a fee or entering a fixed payment using pre-authorized payment methods.

8. Search feature: The intranet site must include a search feature for users to search by topic, key words, etc.

9. The intranet site must be accessible using a standard Internet browser. Users must have appropriate application software to open several of the templates and tools.

10. The intranet site must be available 24 hours a day, 7 days a week, with one hour per week for system maintenance and other periodic maintenance, as appropriate.

Summary of Project Deliverables

Project management-related deliverables: Business case, charter, team contract, scope statement, WBS, schedule, cost baseline, progress reports, final project presentation, final project report, lessons-learned report, and any other documents required to manage the project.

Product-related deliverables:

1. Survey: Survey current consultants and clients to help determine desired content and features for the intranet site. (continued)

105 The Project Management Process Groups: A Case Study Copyright 2012 Cengage Learning. All Rights Reserved. May not be copied, scanned, or duplicated, in whole or in part. also provides a basis for creating the project schedule and performing earned value management for measuring and forecasting project performance. Erica and her team decided to use the project management process groups as the main categories for the WBS, as shown in Figure 3-3. They included completed work from the initiating process to

TABLE 3-9 Scope statement (draft version) (continued)

2. Files for templates: The intranet site will include templates for at least 20 documents when the system is first implemented, and it will have the capacity to store up to 100 documents. The project team will decide on the initial 20 templates based on survey results.
3. Examples of completed templates: The intranet site will include examples of projects that have used the templates available on the site. For example, if there is a template for a business case, there will also be an example of a real business case that uses the template.
4. Instructions for using project management tools: The intranet site will include information on how to use several project management tools, including the following as a minimum: work breakdown structures, Gantt charts, network diagrams, cost estimates, and earned value management. Where appropriate, sample files will be provided in the application software appropriate for the tool. For example, Microsoft Project files will be available to show sample work breakdown structures, Gantt charts, network diagrams, cost estimates, and applications of earned value management. Excel files will be available for sample cost estimates and earned value management charts.
5. Example applications of tools: The intranet site will include examples of real projects that have applied the tools listed in number 4 above.
6. Articles: The intranet

site will include at least 10 useful articles about relevant topics in project management. The intranet site will have the capacity to store at least 1,000 articles in PDF format with an average length of 10 pages each.

7. Links: The intranet site will include links with brief descriptions for at least 20 useful sites. The links will be categorized into meaningful groups.

8. Expert database: In order to deliver an "Ask the Expert" feature, the system must include and access a database of approved experts and their contact information.

He also knew both of the client

TABLE 3–7 Planning processes and outputs (continued)

Knowledge Area Planning Process Outputs

Project Quality Management Plan quality management Quality management plan Process improvement plan Quality metrics Quality checklists Project documents updates Project Human Resource Management Plan human resource management Human resource plan Project Communications Management Plan communications management Communications management plan Project documents updates Project Risk Management Plan risk management Risk management plan Identify risks Risk register Perform qualitative risk analysis Project documents updates Perform quantitative risk analysis Project documents updates Plan risk responses Project management plan updates Project documents updates Project Procurement Management Plan procurement management Procurement management plan Procurement statement of work Procurement documents Source selection criteria Make-or-buy decisions Change requests Project Stakeholder Management Plan stakeholder management Stakeholder management plan Project documents updates

Source: PMBOK (R) Guide, Fifth Edition, 2012.

TABLE 3–9 Scope statement (draft version)

Project Title: Project Management Intranet Site

Project Date: May 18

Prepared by: Erica Bell, Project Manager, erica_bell@jwdconsulting.com

Project Summary and Justification: Joe Fleming, CEO of JWD Consulting, requested this project to assist the company in meeting its strategic goals. She knew it took time to develop these documents, but she wanted to get a feel for what everyone thought were the main deliverables for this project, their roles in producing those deliverables, and what areas of the project scope needed clarification. Note that the scope statement lists the product characteristics and requirements, summarizes the deliverables, and describes project success criteria in detail.

Kevin Dodge was JWD Consulting's intranet guru, who tended to focus on technical details. JWD Consulting believed in using team contracts for all projects to help promote team-work and clarify team communications. It will also help reduce internal costs and improve profitability by providing standard tools, techniques, templates, and project management knowledge to all internal consultants.

Requests for articles: The intranet site will include a section for users to ask someone from the Project Management Office (PMO) at JWD Consulting to research appropriate articles for them. The budget for the project is \$140,000. An additional \$40,000 per year will be required for operational expenses after the project is completed.

Templates and tools: The intranet site will allow authorized users to download files they can use to create project management documents and to help them use project management tools.

User submissions: Users will be encouraged to e-mail files with sample templates and tools to the Webmaster.

User Requests feature: The intranet site will include an application to solicit and process requests from users.

Intranet site design: An initial design of the new intranet site will include a site map, suggested formats, and appropriate graphics.

Erica then explained the importance of the project, again reviewing the signed project charter. The next task would be to clarify the scope of the project by

developing a project scope statement and WBS. These files will be in Microsoft Word, Excel, Access, Project, or in HTML or PDF format, as appropriate. Michael Chen was a senior consultant and often worked on the highest-priority projects for external clients. Cindy Dawson was also from the IT department and had experience working as a business consultant and negotiating with outside suppliers. She also suggested that they all meet again in one week to develop the scope statement further and to start creating the WBS for the project.

The WBS

TABLE 3–8 Team contract

Code of Conduct: As a project team, we will:

- o Work proactively, anticipating potential problems and working to prevent them.
- o Record meeting minutes and send them via e-mail within 24 hours of all project meetings, focusing on decisions made and action items from each meeting.

The preferred format for articles will be PDF. Links: All links to external sites will be tested on a weekly basis. Users will be able to search for experts by predefined topics. The final design will incorporate comments from users on the initial design. Jessie Faue worked in the Project Management Office with Erica, so they knew each other well, but Jessie was new to the company and did not know any of the other team members. Everyone valued Michael's expertise, and he was extremely straightforward in dealing with people. May not be copied, scanned, or duplicated, in whole or in part. Kim Phuong and Page Miller, the two client representatives, were excited about the project, but they were wary of sharing sensitive information about their companies. Erica had all participants introduce themselves, and then she led an icebreaking activity so everyone would be more relaxed. She explained that she would take this information and work with Jessie to develop the first draft of the scope statement that she would e-mail to everyone by the end of the week.

103 The Project Management Process Groups: A Case Study Copyright 2012 Cengage Learning. May not be copied, scanned, or duplicated, in whole or in part. Erica and Jessie reviewed all the information and created the first draft of the scope statement. Table 3–9 shows a portion of the scope statement that Erica created after a few more e-mails and another team meeting. The WBS is a very important tool in project management because it provides the basis for deciding how to do the work.

Problem Solving: We will:

- o Encourage everyone to participate in solving problems.
- o Only use constructive criticism and focus on solving problems, not blaming people.

May not be copied, scanned, or duplicated, in whole or in part. The new intranet site will increase visibility of the company's expertise to current and potential clients. The Webmaster will forward the files to the appropriate person for review and then post the files to the intranet site, if desired. Articles: Articles posted on the intranet site will have appropriate copyright permission. The PMO manager must first approve the request and negotiate payments, if appropriate. He attended the meeting with his assistant, Jill Anderson, who would also support the project when Michael was too busy.

102 Chapter 3 Copyright 2012 Cengage Learning. representatives from past projects. She asked all participants to describe their dream vacations, assuming that cost was no issue. This activity helped everyone get to know each other and show different aspects of their personalities. She explained the main topics covered in a team contract and showed them a team contract template. She then had the team members form two smaller groups, with one consultant, one IT department member, and one client representative in each group. These smaller groups made it easier for everyone to contribute ideas. She reminded everyone what their budget and schedule goals were so they would keep the goals in mind as they discussed the scope of the

project. List one item that is most unclear to you about the scope of this project. What other questions do you have or issues do you foresee about the scope of the project? Erica collected everyone's inputs. At their next team meeting, they discussed the scope statement and got a good start on the WBS. As the project team worked on the scope statement, it also developed the work breakdown structure (WBS) for the project.

Participation: We will:

- o Be honest and open during all project activities.
- o Encourage diversity in team work.
- o Let the project manager know well in advance if a team member has to miss a meeting or may have trouble meeting a deadline for a given task.

Communication: We will:

- o Decide as a team on the best way to communicate. Because a few team members cannot often meet face to face, we will use e-mail, a project Web site, and other technology to assist in communicating.
- o Have the project manager facilitate all meetings and arrange for phone and video conferences, as needed.
- o Work together to create the project schedule and enter actuals into the enterprise-wide project management system by 4 p.m. every Friday.
- o Arrange for telephone or videoconferencing for participants as needed.

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Product Characteristics and Requirements:

1. Erica had met and talked to each member separately, but this was the first time the project team would spend much time together. All Rights Reserved. She explained that an important tool to help a project team work together was to have members develop a team contract that everyone felt comfortable signing. Each group shared its ideas for what should go into the contract, and then everyone worked together to form one project team contract. Table 3-8 shows the resulting team contract, which took about 90 minutes to create. Erica could see that there were different personalities on this team, but she felt they all could work together well. Erica wanted to keep the meeting to its two-hour time limit. List what you believe to be the main deliverables for this project. Which deliverables do you think you will help create or review? All Rights Reserved.
- o Provide the opportunity for equal participation.
- o Be open to new approaches and consider new ideas.
- o Present ideas clearly and concisely.
- o Keep discussions on track.
- o Strive to build on each other's ideas.

Meeting Guidelines: We will:

- o Plan to have a face-to-face meeting the first and third Tuesday morning of every month.
- o Meet more frequently the first month.

All Rights Reserved. It is important to focus on the system paying for itself within one year of its completion. The project manager may approve other formats. Broken links will be fixed or removed within five working days of discovery. Erica knew that it was important to build a strong team and have everyone work well together. She also asked each person to provide the number of hours he or she would be available to work on this project each month for the next six months. She then had each person write answers to the following questions:

1. 2. 3. 4. o Keep other team members informed of information related to the project.
- o Focus on what is best for the entire project team.
- o Have one discussion at a time.
- o Hold other meetings as needed.
2. 3. 4. 5. 6. 9. 10. 11.