

Project Management 101: What I Learned from Taking the CAPM Course

I recently completed a Certified Associate in Project Management (CAPM) preparation course and learned *a lot* about project management. The course covers all 49 processes in *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*. Yes, that's right: According to the Project Management Institute (PMI) a properly run project can consist of up to 49 processes. Each of these processes has several inputs, tools and outputs that should be followed to move through to the next process.

Chances are, 49 processes may seem overwhelming or unnecessary for most projects you oversee. In fact, in a lot of instances, they are. Good news: While it may feel as if you have to know every process inside and out when taking the course, PMI's expectation is that you select those processes and techniques that are appropriate to your environment and the project you are working on.

However, some crucial processes apply to every project and need your attention if you are to succeed. Here are the project management processes you don't want to skip.

1. Develop a Project Charter

The project charter formally authorizes the project and details the business need or outcome(s) desired at its end. The project charter includes business documents, contracts/agreements, stakeholders and the project's purpose.

2. Develop a Project Management Plan

The most crucial and necessary process of any project, the project management plan, provides the foundation for the entire project and instruction/direction to the project team. It includes scope, schedule and budget baselines, which are used to measure and monitor the progress of the project. The plan is a comprehensive look at the whole project: what work has to be done; how that work will be executed; what software will be used; how changes will be managed, monitored and controlled; etc.

3. Identify Stakeholders and Manage Stakeholder Engagement

Identify those people or organizations that are actively involved with the project as stakeholders who can exert influence over the project and its deliverables. Once they are identified, it's crucial to work and communicate with those key stakeholders throughout the project to meet their needs and expectations, and address any issues that may arise.

4. Define Scope, Develop the WBS and Control Scope

"Scope" is defined as the work that must be performed to deliver a product, service or result. The Define Scope process details the project deliverables, along with the work required to create those deliverables. Once scope is defined, you can create the work breakdown structure (WBS), which creates a visual representation of the work needed to complete the project. This process takes the major deliverables of the project and breaks them down into smaller, more-manageable pieces. An output of the WBS is the



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scope baseline, which becomes a defining part of the project management plan. The WBS is your project bible. Any additions or variations from it mean you are deviating from the proposed project and risk creating scope creep. While scope creep is often inevitable in any project, the Control Scope process exists to manage scope creep and ensure the project gets to completion without blowing up your budget and/or schedule.

5. **Define and Sequence Activities, Estimate Activity Durations, and Develop Schedule**

A crucial component of the project management plan is the project schedule, which includes a start date and planned finish date for *each* activity. The schedule is created after a number of schedule-related processes take place. First, you must define activities. This process results in a comprehensive list of all activities or steps needed to complete the project, as well as a description of each. Once the activity list is created, the order in which activities have to be completed can be determined. Some activities may be worked on simultaneously while others may depend upon another activity being finish before work can start on the next one. Once you have a sequence for activities, the time necessary to complete them can be determined. Finally, a project schedule can be completed using the data developed in the previous processes. The project schedule, which will be used to track schedule performance, should include start and finish dates for all project activities, as well as planned dates for meeting project milestones.

6. **Estimate Costs and Determine Budget**

Cost estimates can include facilities, materials, equipment, services, resources and information technology. Depending upon the complexity of the project, this can be a complicated process requiring the use of a variety of analytical cost-estimating techniques. The cost estimates and project schedule can be used to finalize a budget. A cost baseline becomes a key component of the project management plan: That is the time-phased budget used to measure, monitor and control overall cost performance of the project.

7. **Acquire Resources and Manage Team**

Once tasks, schedule and budget have been determined, it is time to acquire resources – both human and physical. This includes team members, facilities, equipment, materials and supplies. Resources may be found in or outside the organization. Once the team is established, it is important to have a system in place to manage it. This means resolving issues, managing changes and tracking project performance to optimize output. After all, a happy team is a productive team!

8. **Direct and Manage Project Work**

Finally, the project is underway! All of the previous processes take place in the planning stages of the project, but directing and managing project work is all about getting things done. This can include:

- Performing activities to accomplish project requirements
- Creating project deliverables
- Staffing, training and managing team members
- Obtaining, managing and using resources such as materials, tools and equipment
- Establishing and managing communication channels
- Issuing change requests
- Managing risk

1. **Close Project**

While this process may seem fairly self-explanatory, it is important to take the time to

ensure it is completed properly. It is the project manager's job to review the project scope statement, project charter and all components of the project management plan to ensure all work has been completed and accepted by the project sponsor. In return, the sponsor should submit a document that the terms and conditions of the project have been met. A written, final report should provide a summary of the project performance, including description of the project, scope, schedule, quality, budget and deliverables.

Whether you're working on a small bio project for a practice group or a massive revamp of your firm's website, it's important to manage the project properly from beginning to end to guarantee success. Following these steps will help you avoid the pitfalls and problems that can arise with any project.

Do you have a project you need help managing? Contact me, [Jennifer Faivre](mailto:jfaivre@jaffepr.com), at jfaivre@jaffepr.com.