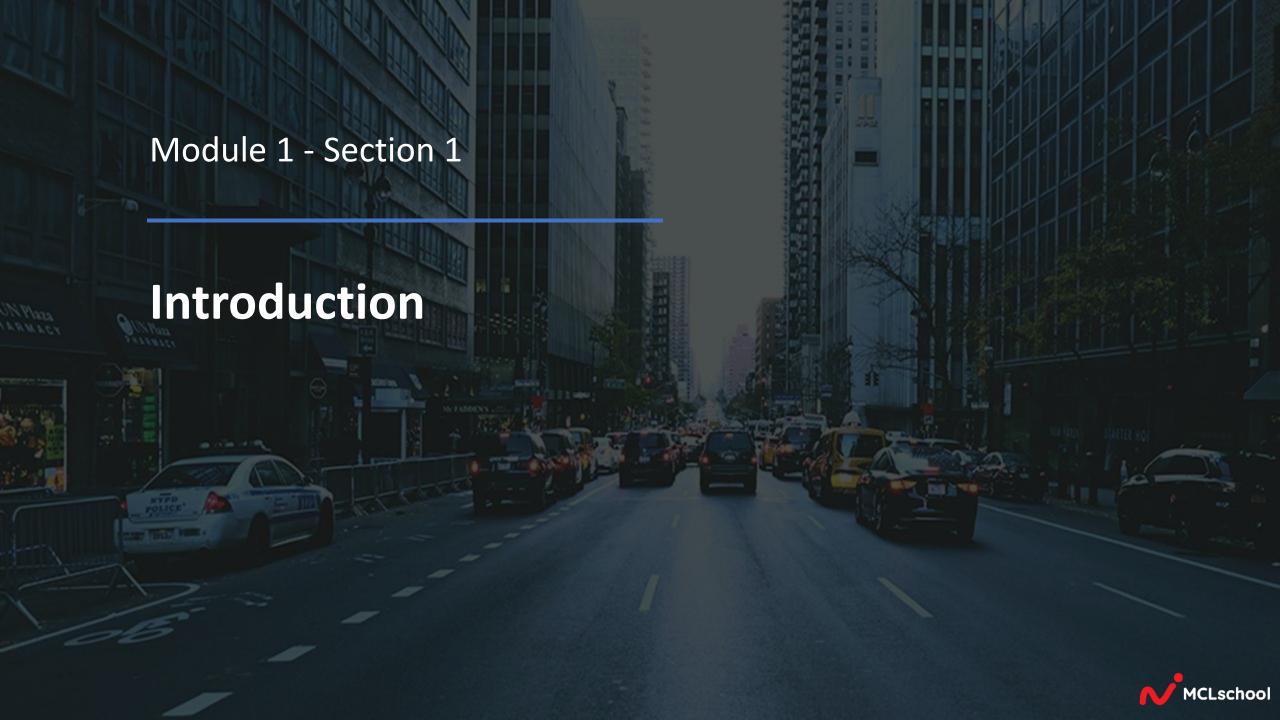


Project Management Fundamentals

This course provides good understanding of the fundamentals of project management

Ron Caldwell PMP, P.Eng, CEM



Overview

- Discuss PMI[®] and PMP[®] Certification
- What is a Project?
- What is Project Management?
- Project Management Scope of Influence
- Project, Program and Portfolio Management
- Project Management as a Profession
- Introduction to Agile

Recommended Reading

A Guide to the Project Management Body of Knowledge (PMBOK® Guide)

6th Edition by Project Management Institute (PMI)

Agile Practice Guide

Project Management Institute (PMI), 2017



PMI and **PMP** Certification

The following are important terms and concepts related to your certification:

- PMI: Project Management Institute
- PMP: Project Management Professional
- CCR: Continuing Certification Requirements
- PDU: Professional Development Unit
- PMBOK® Guide: A Guide to the Project Management Body of Knowledge
- PMBOK® Guide is a textbook for the PMP exam
- REP: Registered Education Provider
- PMI is an organization; PMP is a credential
- PMI conducts and supervises the PMP examinations
- Your PMP credential is valid for 3 years
- 60 PDUs are required every three years to maintain your PMP certification



Discuss PMI® and PMP® Certification

Application Requirements for PMP Certification Exam

| Category | College/University Education | PM Training | Hours Leading and Directing Project Tasks | Months of PM Experience |
|----------|---------------------------------|------------------|--|---|
| One | Bachelor's Degree | 35 Contact Hours | 4,500 hours | 36 months within last 8 consecutive years |
| Two | High School Graduate | 35 Contact Hours | 7,500 hours | 60 months within last 8 consecutive years |

Application can be submitted online at www.pmi.org.

PMI Certifications

- Each of these certifications requires a participant to have a combination of:
 - Education: different qualifications for high school, college and university graduates
 - Experience: number of hours working in the profession
 - Formal project management training: number of hours of professional training
 - Plus the ability to pass a computer-based exam: 2 to 4 hours in length



PMP Exam Changes

PMI Update

PMP Exam changed January 2nd

- Based on ECO domains of Process (50%), People (42%), Business (8%)
- Divided by PM approaches: Predictive (50%), Hybrid (27%), Agile (23%)

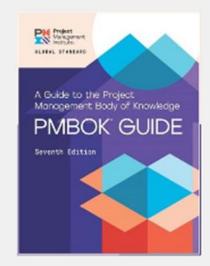


PMP® Exam Prep Course - March

- Strong registrations
- · Learner feedback & course sequencing

PMBOK® Guide - 7th Edition

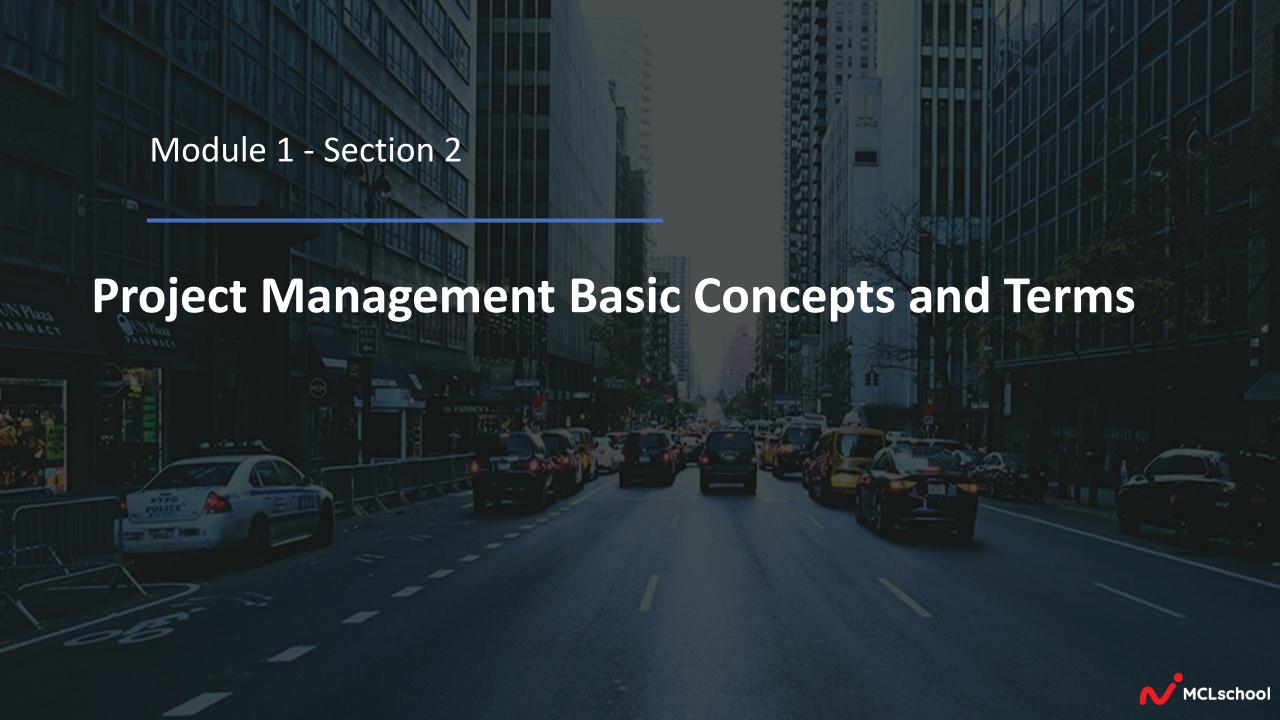
- August 1st release date
- Moved from 5 process groups and 10 knowledge areas to 12 principles and 8 domains











What is a project?

Project is... "a temporary endeavor undertaken to create a unique product, service, or result." – As per the Project Management Institute

- Projects create unique products, services or results
- Projects are progressively elaborated
- Projects can be large or small and take a short or long time to complete
- A project ends when their objectives have been reached or the project has been terminated



Examples of projects:

- A building can be a project
- a website design can be a project
- Building a bridge can be a project



What is a Project? (cont'd)

Project Attributes

- Further defines a project
- Well-defined objectives
 - Product specifications
 - Scope
 - Cost
 - Schedule: defined start and completion dates
 - Quality
- Utilizes various resources
 - Human, physical, financial, knowledge, etc.
- Has a primary customer and/or interested stakeholders
- Performed by enterprises or organizations
- Involves a degree of uncertainty



What is a Project? (cont'd)



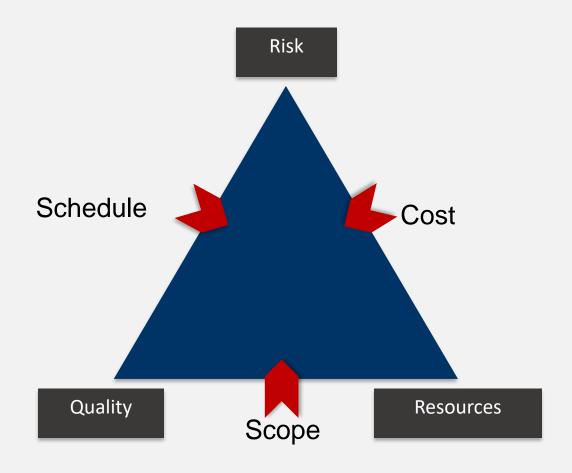
Project Manager in Action

Project Constraints

- Every project is constrained in different ways
- A project manager must consider and juggle these constraints
- The "Triple Constraints" are commonly described as Scope, Schedule, and
 Cost



What is a Project? (cont'd)



Project Constraints

Additional competing constraints include **Quality**, **Resources** and **Risks**Changing one of these will impact the others.



Project vs Operation

Projects

A <u>temporary</u>
 endeavor
 undertaken to
 create a <u>unique</u>
 product, service,
 or result

Operations

Ongoing and repetitive activities with permanent objectives



Projects end when their objectives have been reached or the project has been terminated



Project vs Operation (cont'd)

Projects vs. Operations

Project

A <u>temporary</u> endeavor undertaken to create a <u>unique</u> product, service, or result

- ERP Migration
- Building a water system for a community
- Building a new car prototype

Attains its objective and then terminates



Operational Work

Ongoing and repetitive activities with permanent objectives

- Help desk
- Monthly closing processes
- Maintenance on a server or database

Sustains the business in an on-going, somewhat repetitive manner





What are Deliverables

What is a deliverable?

- A deliverable is the unique product, service or result produced by the project
- The outputs produced by the project are project deliverables
- Within a project there can be multiple deliverables



Well the final delivery is the complete house.

There are multiple deliverables or sub projects that are inputs in the house which includes:

- √ The foundation for the house
- ✓ the walls of the house
- √ the roof off of the house





Project Concepts – Questions

- 1. A _____ is a temporary endeavor undertaken to create a unique product, service, or result.
 - a. program
 - b. process
 - c. project
 - d. Portfolio
- 2. Which of the following is often added to the project triple constraint?
 - a. Meeting scope goals
 - b. Meeting quality goals
 - c. Meeting communications goals
 - d. Meeting procurement goals
- 3. _____ is work done in organizations to sustain the business.
 - a. Project management
 - b. Program management
 - c. Project portfolio management
 - d. Operations



Why Projects Fail

Research has identified the following top reasons for project failures:

- 1. Requirements that are ambiguous, misunderstood, or incorrect
- 2. Controlling cost and schedule
- 3. Scope creep
- 4. Sponsor not actively involved in the project strategy and direction
- 5. Project plan that is nonexistent, out of date, incomplete, or poorly constructed
- 6. Frequent changes of assigned PM
- 7. Project teams (external and in-house resources) whose responsibilities and relationships are not
- clearly defined in writing
- 8. No clear definition of the benefits and the deliverables that will produce them
- 9. Poor or no change control
- 10. Inappropriate or insufficient skill



Why Projects Succeed

- Project Sponsorship at executive level
- Good project charter
- Strong project management
- The right mix and management of team players
- Good decision-making structure
- Good communication
- Team members are working toward common goals





What is Project Management?

- "Project Management is the skills, tools and management processes required to undertake a project successfully"
- Project Management is comprised of:
 - A set of skills. Specialist knowledge, skills and experience are required to reduce the level of risk and thereby enhance likelihood of success
 - A suite of tools. Various types of tools are used by project managers. Examples include document templates, registers, planning software, checklists, etc.
 - A series of processes. Various management techniques and processes are required to monitor and control time, cost, quality, scope, etc.





PMBOK® Guide 7th Edition – July 2021 NEW: Project Management Principles



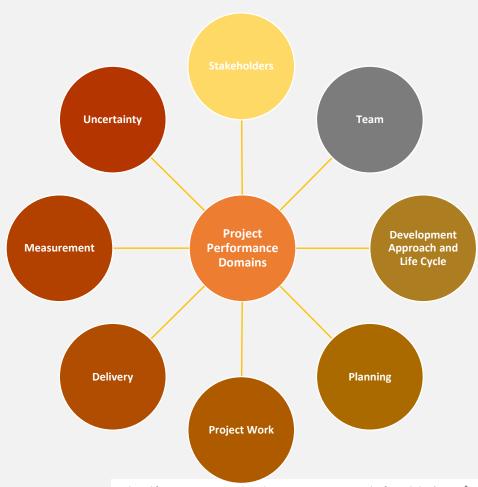
12 principles of project management:

- 1. Stewardship: Be a diligent, respectful, and caring steward
- 2. Team: Create a collaborative project team environment
- 3. Stakeholders: Effectively engage with stakeholders
- 4. Value: Focus on value
- 5. Systems thinking: Recognize, evaluate, and respond to system interactions
- 6. Leadership: Demonstrate leadership behaviors
- 7. Tailoring: Tailor based on context
- 8. Quality: Build quality into processes and deliverables
- 9. Complexity: Navigate complexity
- 10. Risk: Optimize risk responses
- 11. Adaptability and resiliency: Embrace adaptability and resiliency
- 12. Change: Enable change to achieve the envisioned future state



PMBOK® Guide 7th Edition – July 2021 NEW: Project Performance Domains





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PMBOK® Guide 7th Edition – July 2021 NEW: Project Performance Domains



PMBOK® Guide – Sixth Edition

A Guide to the Project Management Body of Knowledge

- Introduction, Project Environment, and Role of the Project Manager
- Knowledge Areas
 - Integration
 - Scope
 - Schedule
 - Cost
 - Quality
 - Resources
 - Communications
 - Risk
 - Procurement
 - Stakeholders

The Standard for Project Management

- Initiating
- Planning
- Executing
- Monitoring and Controlling
- Closing

PMBOK® Guide - Seventh Edition

The Standard for Project Management

- Introduction, System of Value Delivery
- Project Management Principles
 - Stewardship
- Tailoring
- Team

- Quality
- Stakeholders
- ComplexityRisk
- Value Systems Thinking
- Adaptability and Resiliency
- Leadership
- Change

A Guide to the Project Management Body of Knowledge

- Project Performance Domains
 - Stakeholders
- Planning

• Team

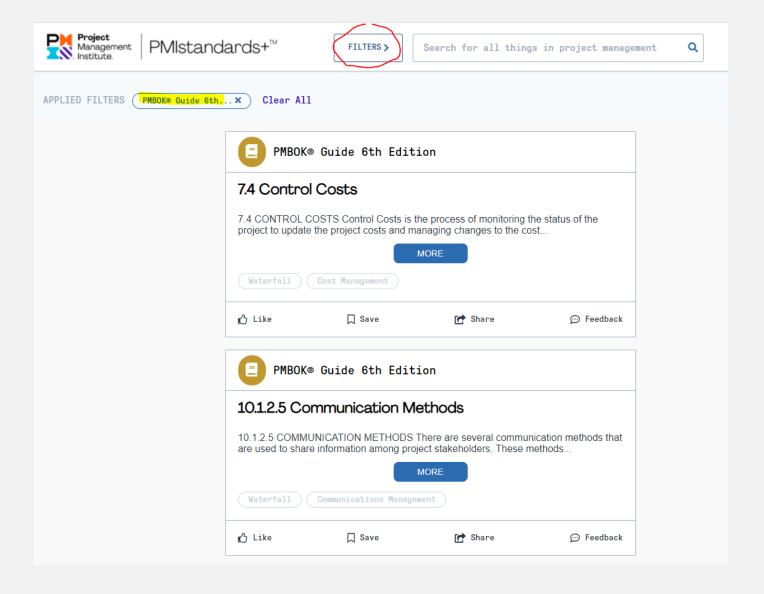
- Project WorkDelivery
- Development Approach and
- Measurement
- Life Cycle
- Uncertainty
- Tailoring
- Models, Methods, and Artifacts



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PMIstandards+



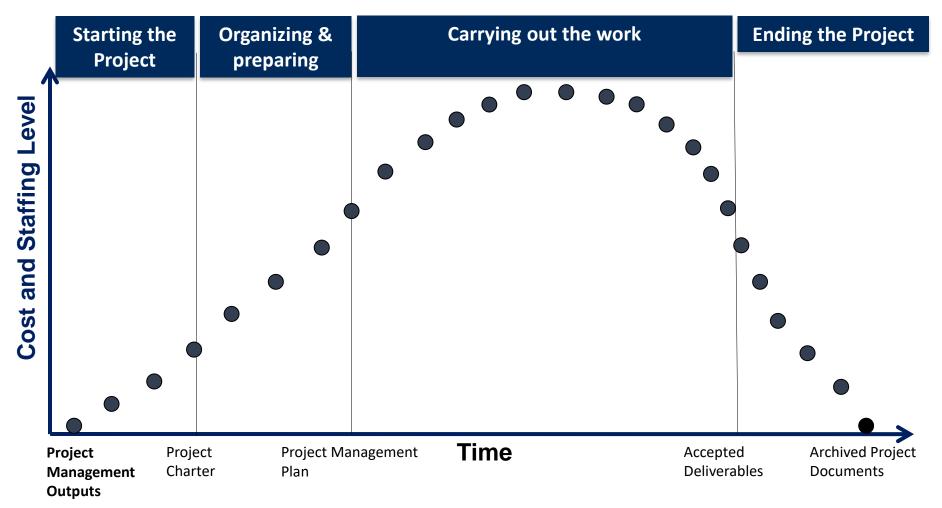


Project Life Cycle

- The project life cycle defines:
 - What technical work is in each phase
 - When the deliverables are to be generated in each phase
 - How each deliverable is to be reviewed, verified and validated
 - Who is involved in each phase
 - How to control and approve each phase
- The project life cycle is different from the product life cycle
- A project is only part of a product life cycle
- There are different project life cycles:
 - Predictive
 - Iterative
 - Incremental
 - Adaptive
 - Hybrid



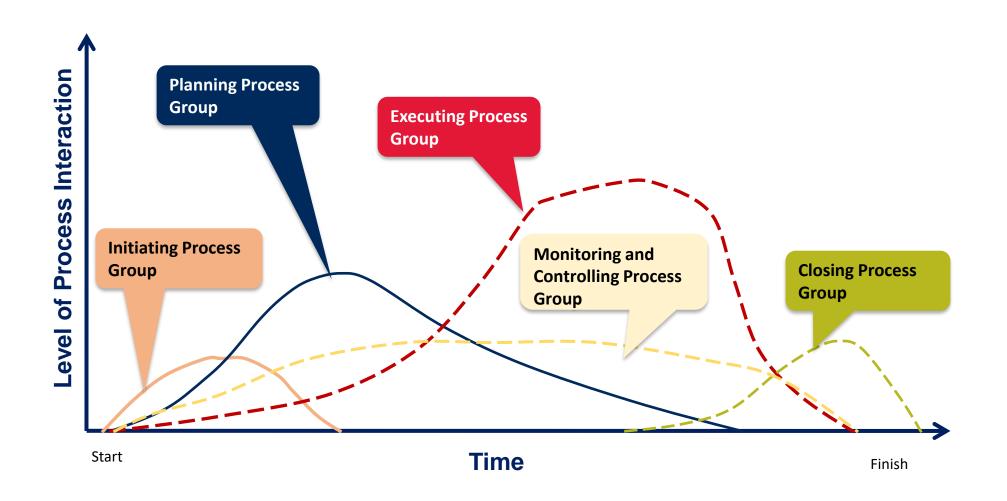
Predictive Project Life Cycle



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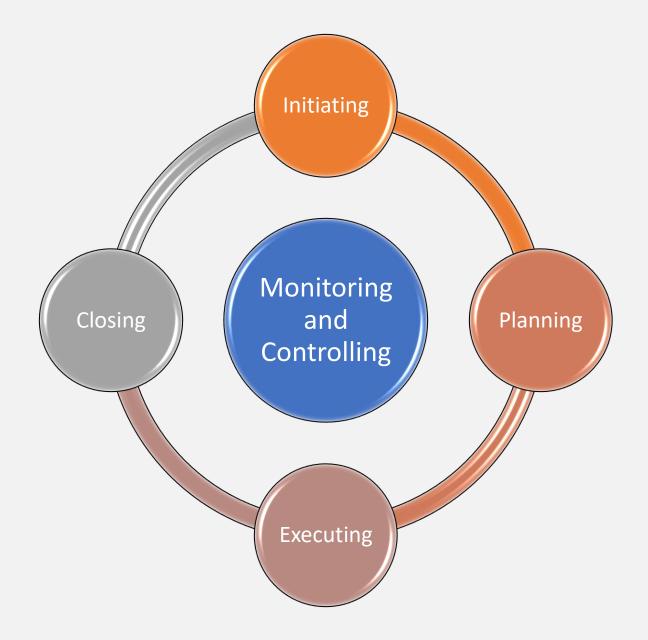
Five Project Process Groups





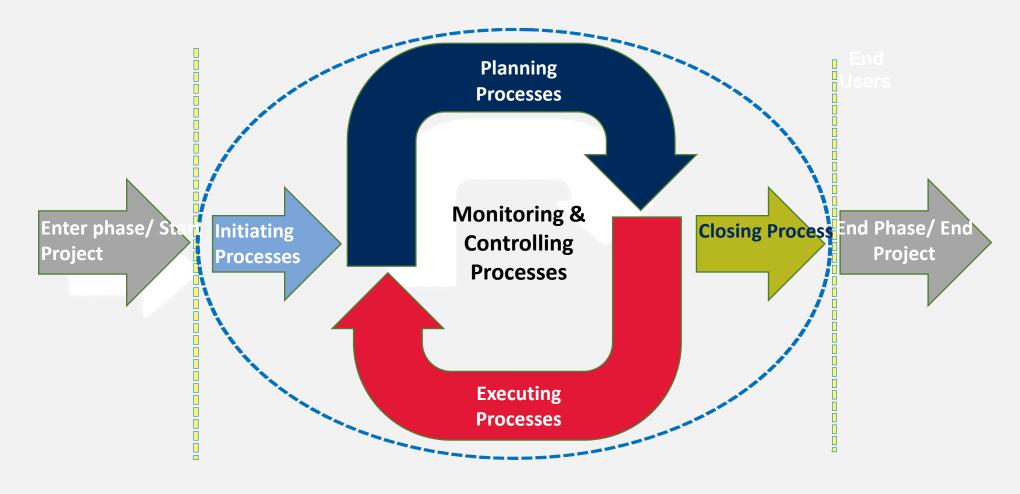
Project Lifecycle

- Project passes through these four-life cycle
- These are often iterative
- Project managers direct, supervise and manage the project as they pass these phases





Five Project Process Groups (cont'd)



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1.7 Project Lifecycle - contd

1. Initiating

initiating involves starting a project and developing the initial requirements to begin the project

2. Planning

Planning involves establishing what is to be done on the project and defining the course off action of how the project and its requirements will be achieved

3. Executing

Executing is concerned with getting the work done to achieve the project's objective

4. Monitoring and Controlling

Monitoring and controlling includes tracking, reviewing and regulating the performance off the project

- Monitoring refers to collecting, measuring and analyzing information related to project performance and identifying where there are variances
- Controlling is making sure appropriate corrective actions are taken to bring the project performance back on track as per defined criteria of standards
- 5. Closing involves finalizing all the activities off the project and then formally closing the project



10 Knowledge Areas

- 1. Integration Management
- 2. Scope Management
- 3. Schedule Management
- 4. Cost Management
- 5. Quality Management
- 6. Resource Management
- 7. Communications Management
- 8. Risk Management
- 9. Procurement Management
- 10. Stakeholder Management



10 Knowledge Areas (cont'd)

| Knowledge Area | Tools and Techniques | |
|------------------------|--|--|
| Integration management | Project selection methods, project management methodologies, project charters, project management plans, project management software, change requests, change control boards, project review meetings, lessons-learned reports | |
| Scope management | Scope statements, work breakdown structures, mind maps, statements of work, requirements analyses, scope management plans, scope verification techniques, and scope change controls | |
| Schedule management | Gantt charts, project network diagrams, critical-path analyses, crashing, fast tracking, schedule performance measurements | |



10 Knowledge Areas (cont'd)

| Knowledge Area | Tools and Techniques | |
|------------------------|---|--|
| Cost management | Net present value, return on investment, payback analyses, earned value management, project portfolio management, cost estimates, cost management plans, cost baselines | |
| Quality management | Quality metrics, checklists, quality control charts, Pareto diagrams, fishbone diagrams, maturity models, statistical methods | |
| Resource management | Motivation techniques, empathic listening, responsibility assignment matrices, project organizational charts, resource histograms, team building exercises | |



10 Knowledge Areas (cont'd)

| Knowledge Area | Tools and Techniques |
|---------------------------|--|
| Communications management | Communications management plans, kickoff meetings, conflict management, communications media selection, status and progress reports, virtual communications, templates, project websites |
| Risk management | Risk management plans, risk registers, probability/impact matrices, risk rankings |
| Procurement management | Make-or-buy analyses, contracts, requests for proposals or quotes, source selections, supplier evaluation matrices |
| Stakeholder management | Stakeholder registers, stakeholder analyses, issue logs, interpersonal skills, reporting systems |



Project Processes

- Processes are at the heart of project management.
- Almost everything in the world of project management is done through processes
- Each process is defined in three (3) elements:

Inputs

→ What do we need to start or do this process?

Any item, whether internal or external to the project that is required by a process before that process proceeds. May be an output from a predecessor process.

Tools & Techniques

→ What are we going to use to create or generate data from the process?

Something tangible, such as a template or software program, used in performing an activity to produce a product or result.

Outputs

→ What will we end up with once we have created or generated data?

A product, result or service generated by a process. May be an input to a successor process.

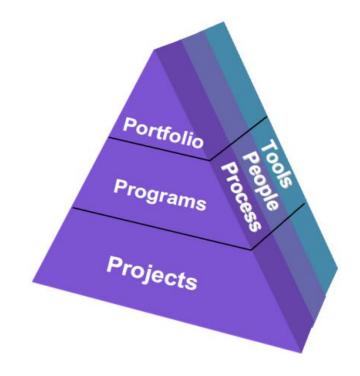
Note: Diagrams like this appear regularly throughout the course. Items highlighted in yellow have information within the slides.





Project, Program and Portfolio Management

- Projects make up a significant portion of work in organizations
- To help manage projects, they are organized into programs and portfolios
 - Portfolio: projects, programs and subsidiary programs and operations managed as a group to achieve strategic objectives
 - Program: a group of related projects, subsidiary programs and programs activities managed in a coordinated manner to obtain benefits
 - Project: A unique effort with a defined end, specified deliverable(s) and defined resources





Portfolio

- A collection of projects and programs that are grouped together to facilitate effective management to meet strategic business objectives
- Investing in projects that are aligned to strategic objectives
- Focuses on doing the "right" programs and projects
- Prioritizes team and physical resource allocation
- Projects or programs in the portfolio may not necessarily be interdependent or directly related
- Examples:
 - Waterfront Development
 - Quality Improvement Initiatives

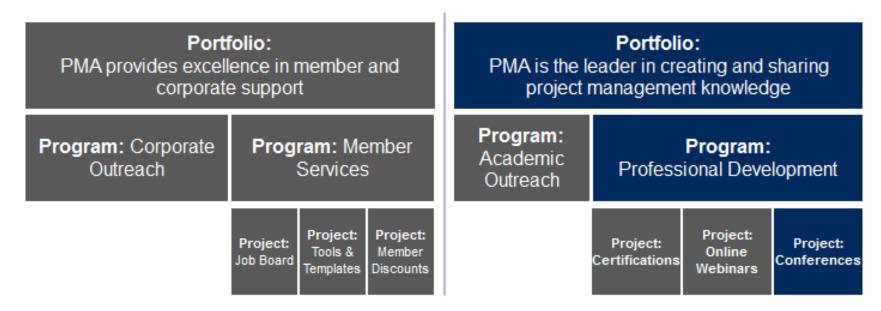


Program

- Related projects managed in a coordinated way to obtain benefits and control not available from managing them individually
- Focuses on interdependencies to determine optimal approach
- May include elements or related work outside of the scope of the projects in the program
- Examples:
 - Academic Information Software Program
 - Website
 - Registration
 - Student Records
 - Academic Programs
 - Airport renewal program



- Portfolio and Program Example (fictional case study)
 - Project Management Association for Project Managers (PMA-PM)
 - Strategy: PMA will be the go-to organization for project managers to obtain project management knowledge





| Organizational Project Management | | | | | |
|-----------------------------------|--|---|--|--|--|
| | Projects | Programs | Portfolios | | |
| Scope | Defined objectives | Larger scope, more significant benefits | Changes with strategic objectives | | |
| Change | Expect change. Implement, monitor, Control | Expect change from inside and outside. Prepare to manage. | Continuously monitor broader internal and external environment | | |
| Planning | Progressively elaborate detailed plans | Develop overall program plan, create high level plans | Create, maintain processes and communication relative to the portfolio | | |
| Management | Project team | Program staff and project managers | Portfolio staff, program managers and project staff | | |
| Success | Project on scope, time, budget, quality and to customer satisfaction | Satisfaction on needs, benefits of program | Investment, performance and benefit realization of the portfolio | | |
| Monitoring | Monitor work on the project | Monitor program components to ensure overall goals and benefits | Monitor strategic changes, performance results and risk to the portfolio | | |



Project, Program, Portfolio – Questions

| 1. | Project portfolio management addresses | goals. |
|----|--|--|
| | a. strategic | |
| | b. tactical | |
| | c. internal | |
| | d. external | |
| | A is a group of related projects managed in a coothat are not available from managing them individually. | rdinated way to obtain benefits and contro |
| | a. project | |
| | b. program | |
| | c. portfolio | |
| | d. plan | |
| | The President of a small research company decides to impr management. The IT manager is put in charge of implemer timeframe and budget. The IT manager is managing a | nting a new application within a set |
| | a. project | |
| | b. program | |
| | c. portfolio | |
| | d. plan | |





The Role of the Project Manager

- The PM is assigned to the before or during the project initiating
- May help in writing the Project Charter
- Is in charge of managing the project and coordinating the work to resource is and apartments
- Is responsible for the success or failure of the project
- May or may not be in charge off the resource is depending on the type of organization structure
- Produces realistic schedule
- Develop reserves for time and costs for the project



Project manager's role on the project

- The project manager is the person assigned by the organization to manage the project team to achieve the project objectives
- The project manager needs to have excellent interpersonal and communication skills as 90 percent of his/her time It will be spent will be spent communicating between teams, individuals and other stakeholders
- The project manager can be expected to spend time performing leadership, building teams, making decisions, negotiating, managing conflicts, coaching and guiding people
- All these skills are necessary because the project manager is responsible for getting work done through other people that is project to you and stakeholders



Project manager's competency

- **Knowledge:** what the project manager knows regarding project management
- Performance: what the project manager actually does by applying project management knowledge
- Personal: how the project manager behaves while managing the project

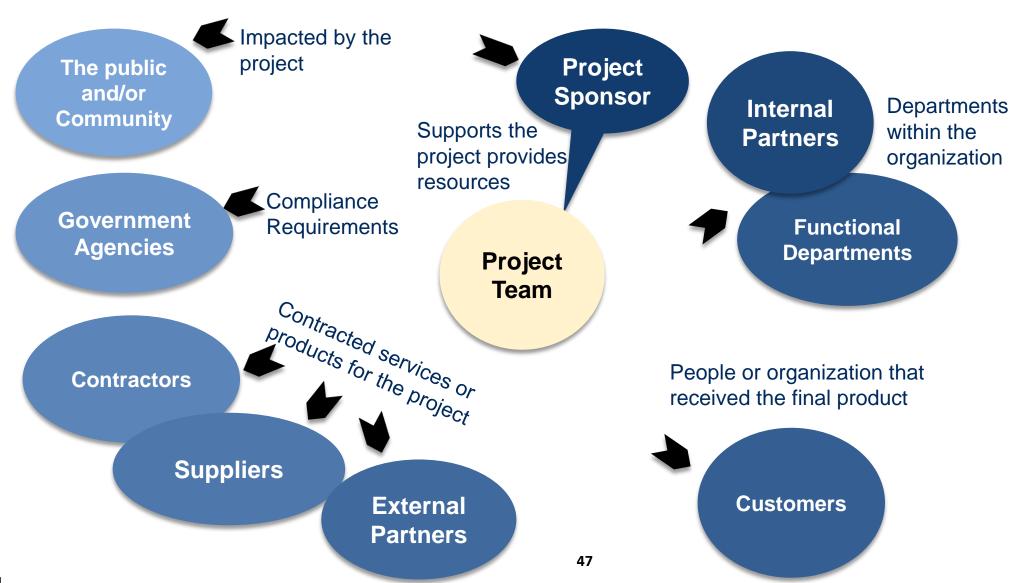


Who are Stakeholders

- Stakeholder refers to all the people or organizations involved in the project
- They may be internal or external to the organization
- They may have an active role by being directly involved in the project or an advisory role as experts
- They can be positively or negatively effected as a result of the project
- Stakeholders can also influence the project positively or negatively. Their influence needs to be managed by the project manager in order for the project to be successful.



Who are Stakeholders





Managing Stakeholders Expectations

Sponsors

- Supports the project provides resources
- Spokesperson for the project for the upper management
- For problems and issues that the project manager does not have the authority to solver, the sponsor sought for help

Customer

 People are organisations who will receive the final product of the project.

Project team

The project manager and the group of people who are involved in performing the work of the project to achieve its objective



Managing Stakeholders Expectations

Project management staff :

 Team members who are responsible for performing project management activities such as scheduling, budgeting, reporting, risk management, etc.

Project staff:

People who are responsible for producing the project deliverables

• Experts:

 Subject matter experts who help out in the project management planning or the actual execution of the project.

• Sellers:

 external companies, i.e. contractors are suppliers provide services, resource is and items to be organization performing the project

Business partners:

• External companies who may have special relationship with performing organization may provide specialized roles such as training, support and installation



Why are Project Started

Why are project started

Project car started to meet an organization this is need or organizational strategic goals

And organization may want to develop a new software application for its business processes, launch a new product line or want to upgrade its factory machine

All these reasons can be considered as the **business case** for starting a project

Business Case

Business case explains the reason why a project was chosen to be started in the first place and whether it is worth doing.

It generally provides a cost benefit analysis summary asked why the project should be done



Enterprise environmental factors

- Enterprise environmental factors are the factors or conditions project team has to deal with while working on the project
- These includes factors related to the culture and systems off the organization in which the project is being conducted graph
- The project team may have no control on the systems and culture and has to work on the project while taking such factors into account

Examples:

- Government regulations
- Organizational culture
- Market conditions
- Company Hierarchy
- Political conditions



Organization Culture Impact on Projects

Organization culture

- Procedures process for half task are carried out
- Policies rules which an organization follows
- Culture and norms the established way by which an organization approaches and conducts projects

A project manager should know the sort of culture and norms in an organization that may affect project

- Today's complex environments require ongoing implementations
- Project management is a method and mindset...a disciplined approach to managing chaos





Project Management as a Profession





General Management Skills

- Financial management, procurement, sales, marketing, contracts, manufacturing, distribution, logistics
- Strategic planning, tactical planning, operations management, personnel administration, career paths, health and safety

"Soft Skills"

- Communication, leadership, motivation, negotiation, conflict management, and problem solving.
- Vision, delegation, creating an energetic and positive environment



Project Environment





Management and Leadership

| Management | Leadership | |
|---|--|--|
| Direct using positional power | Guide, influence, and collaborate using | |
| | relational power | |
| Maintain | Develop | |
| Administrate | Innovate | |
| Focus on systems and structure | Focus on relationships with people | |
| Rely on control | Inspire trust | |
| Focus on near-term goals | Focus on long-range vision | |
| Ask how and when | Ask what and why | |
| Focus on the bottom line | Focus on the horizon | |
| Accepts the status quo | Challenges the status quo | |
| Do things right | Does the right things | |
| Focus on operational issues and problem | Focus on vision, alignment, motivation and | |
| solving | inspiration | |



Project Manager's Sphere of Influence





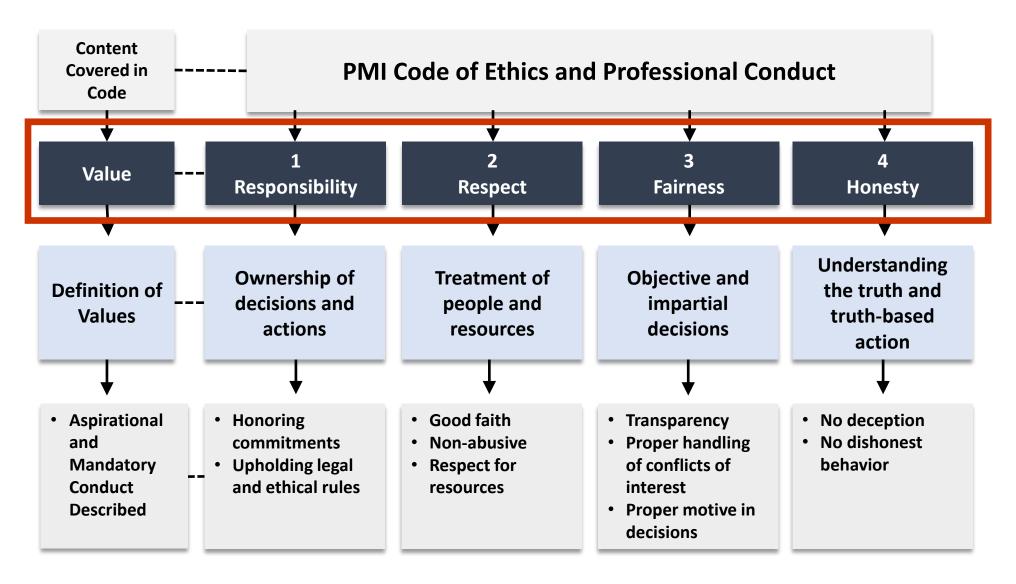
PMI Talent Triangle

- After certification, project managers continue to acquire professional development units (PDUs)
- These are now broken into three categories
 - Technical project management skills:
 Understanding the knowledge areas,
 process groups, and project
 management tools and techniques
 - Strategic and business management skills: Includes strategic planning financial management, accounting, and marketing
 - **Leadership skills:** Focusing on long -term goals and big-picture objectives, while inspiring people to reach those goals

The PMI Talent Triangle®









Responsibility

- Take ownership for our decisions and consequences
- Aspirational Standards
 - Make decisions, take actions based on best interests of society, public safety environment
- Mandatory Standards
 - Regulations & Legal Requirements
 - Ethics Complaints

Respect

- Show high regard for ourselves, others and resources entrusted to us
- Aspirational Standards
 - Understand cultural norms, customs; avoid engaging in behaviours that may be considered disrespectful
- Mandatory Standards
 - Negotiate in good faith







Fairness

- Make decisions and act impartially and objectively
- Aspirational Standards
 - Demonstrate transparency in your decision-making process
- Mandatory Standards
 - Avoid Conflict of Interest
 - Do not display favoritism or discriminate

Honesty

- Understand the truth and act and communicate truthfully
- Aspirational Standards
 - Constantly maintain our impartiality and objectivity
- Mandatory Standards
 - Do not engage in or condone behavior designed to deceive others







Project Management as a Profession – Questions

- 1. Project managers need to have strong soft skills. The importance of soft skills will vary between types of projects. For large projects, the most important soft skill is?
 - a. Leadership
 - b. Problem solving
 - c. Critical thinking
 - d. Consistency
- 2. Human relations or _____ skills include effective communication, leadership, motivation, and negotiation skills
 - a. hard
 - b. soft
 - c. management
 - d. warm
- 3. _____ is a set of principles that guide our decision making based on personal values of what is "right" and "wrong."
 - a. Values
 - b. Morality
 - c. Religion
 - d. Ethics





What is Agile?

- Started as a set of management practices relevant to software development
- Continued as an interactive approach where requirements and solutions evolve through collaboration between cross-functional teams
- Evolved as the ability to create and respond to change

"Agile working is a way of working in which an organization empowers its people to work where, when and how they choose — with maximum flexibility and minimum constraints — to optimize their performance and to do their best work".

(The British Computer Society)



Adaptive: The Agile Manifesto

- We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value more:
 - Individuals and interactions over processes and tools
 - Working software over comprehensive documentation
 - Customer collaboration over contract negotiation
 - Responding to change over following a plan
- That is, while there is value in the items on the right, we value the items on the left more



Agile Principles

The 12 Principles behind the Agile Manifesto:

- 1. Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.
- 2. Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage.
- 3. Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale.
- 4. Business people and developers must work together daily throughout the project.
- 5. Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done.
- 6. The most efficient and effective method of conveying information to and within a development team is face-to-face conversation.



Agile Principles (cont'd)

- 7. Working software is the primary measure of progress.
- 8. Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely.
- 9. Continuous attention to technical excellence and good design enhances agility.
- 10. Simplicity—the art of maximizing the amount of work *not* done—is essential.
- 11. The best architectures, requirements, and designs emerge from self-organizing teams.
- 12. At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly.



Project Management - Questions

| 1. | more a. i b. c. o | ording to studies done on where project managers spend their time, the best project managers spend time on the phase of a project than the typical project manager. Initiating planning closing controlling |
|----|------------------------------|--|
| 2. | Adap | tive project life cycle is based on the Agile Manifesto. The Agile Manifesto values |
| | a. | Working software over responding to change |
| | b. | Processes and tools over following a plan |
| | c. | Customer value over contract management |
| | d. | Working software over comprehensive documentation |
| 3. | • | ct Management is the project management knowledge area that deals with the collection and management of ct knowledge. |
| | a. | Integration |
| | b. | Communication |
| | c. | Stakeholder |
| | d. | Quality |
| | | |



Learning Outcome for this Module

- Define Projects and Triple Constraints
- Describe the characteristics of a Project Life Cycle
- Explain the differences between Projects, Programs, and Portfolios
- Describe the skills required in both general management and project management



Module 1 – Review

- What is a Project?
- What is Project Management?
- Project, Program and Portfolio Management
- Project Management as a Profession



Next Module

- Module 2: Selection & Initiation
 - Project selection
 - Organizational Environments
 - Project Methodologies
 - Initiating Process Group



