Chapter One

Why Do Project Managers Need This Book?

The main purpose of this book is to create a connection between what is referred to as "the body of knowledge of project management," the Project Management Institute's *A Guide to the Project Management Body of Knowledge*® (better known as the *PMBOK*® *Guide*), and the needs of the practicing project manager. The book is not specific to any industry. It is intended to provide additional information regarding the processes associated with managing projects and offer the reader other perspectives about the discipline including a practical and useful explanation of many of the tools, techniques, and processes described in the *PMBOK*® *Guide*. There are countless other books about project management that include suggested methodologies, templates, defined processes and procedures, and best practices—and many are excellent sources of reference. The focus of this book is on the practitioner, especially those who manage projects of moderate complexity.

This book is intended to make a direct connection between many of the terms and specific tools, techniques, inputs, and outputs described in the *PMBOK® Guide* and the common needs of today's practicing project managers. The objective is to provide a quick reference and a source of information that translates tools and techniques into useful templates, actionable steps, clarified processes, and common-sense approaches to managing a project.

The material and references in this are designed to be of interest to the newly appointed project manager as well as the seasoned professional. Experienced project managers may find the material helpful in further developing well-defined practices they are currently using, or the material may spark a new level of creativity and innovation that will take project management to a new level of efficiency. This book will help project managers and students of project management differentiate between generally practiced processes and those processes that are specific to a particular organization.

I have heard many people refer to the *PMBOK® Guide* as the "PMI Way" or refer to project management methodology in terms of "the Right Way, the wrong way, and the "PMBOK® way." The *PMBOK® Guide* does not suggest a right or wrong way and, in my opinion, there is no specific "PMI Way" or "PMBOK® Way." Everything in the *PMBOK® Guide* originates from the knowledge of hundreds of project managers who have decided to share their experiences across a very broad spectrum of projects and industries. This shared knowledge has been organized into the nine knowledge areas and 5 processes which provide the basis for developing organizational project management methodologies. Simply stated, there are projects that are managed well and those that are not managed well regardless of preferred methodology. If the methodology was developed using logic, common sense and the basic principles of project

management along with a connection to the organization's culture, work ethic, business goals and capabilities then that would be the "right" methodology for the organization. Chances are that many of the project management steps and processes found in any organizational methodology can also be found in the *PMBOK® Guide* or can be directly related to *PMBOK® Guide* processes. I believe that most project managers will agree that in the discipline of, or if you prefer, the profession of **project management** the general principles are the same, regardless of what type of project is being managed. These general principles are then modified and combined with different approaches specific to the organization that can be used to achieve the common goals of on time completion, remaining within budget, and according to specifications. (there are other goals to consider but these are the goals most people associate with project success). The *PMBOK® Guide* provides a solid *framework for developing a methodology that would have a high probability of being accepted by the stakeholders of an organization.* It may not provide the extreme levels of detail that may be needed to develop a complete methodology, but it does provide the project manager with a reference point developed through the experience of hundreds of project managers over many years.

The purpose of this book is to bridge the needs of the project manager with the vast stores of knowledge about project management and to encourage project managers to expand their knowledge about the profession, challenge some of the processes in place and develop newer, more efficient ways of managing projects in a world filled with complex projects and new opportunities. This book will, I hope, encourage more thought about how to manage projects more effectively and open up the creative minds of project managers who can widen the project management information highway.

THE *PMBOK® GUIDE*, THE BODY OF KNOWLEDGE OF PROJECT MANAGEMENT, AND THE CONNECTION TO MANAGING PROJECTS

The *PMBOK® Guide* is a collection of tools, techniques, and processes developed by project managers engaged in projects across every type of business and industry. Project managers have offered their time and their expertise voluntarily to produce a consensus-based standard for managing a project. It is a valuable source of information for project managers, project management professionals, and future project managers, regardless of discipline. The *PMBOK® Guide* provides the basis for developing project management methodologies and can be found in the library of literally thousands of project management offices and practicing project managers. The challenge is to take the information provided in the *PMBOK® Guide* and apply it most effectively and appropriately to an actual project environment. This book focuses on specific techniques, explanations of terms, and application of tools that will enable project managers to effectively adapt the principles and processes described in the *PMBOK® Guide* to the practical world of project management. These techniques transform the *PMBOK® Guide* from a framework and standards reference to a sharpened tool in the project manager's toolbox.

Project management and the processes included within it definition is actually a collection of knowledge from every business discipline, and that knowledge base is in a continuous state of growth. This knowledge encompasses what has been learned through years of managerial experience, studying human behavior, analyzing relationships between organizations, engaging in strategic planning, managing conflict, performing financial planning, and understanding organizational structure and overall organizational performance. The greater, more complex, project management body of knowledge is basically a

repository of information and best practices gathered from and covering every aspect of business and organizational management. The *PMBOK® Guide* organizes that knowledge in a logical format that is not intended to be viewed as a set of rules and regulations. It provides a basis for developing customized methods that will assist in meeting an organization's project and strategic objectives through an effective project management process. The lessons learned from completed projects are documented and shared (whenever possible) through networking with other practitioners, articles, books, and other forms of knowledge transfer and are added to the larger body of knowledge in a continuous and ever expanding cycle.

THE FIRST STEP: UNDERSTANDING HOW THE *PMBOK® GUIDE* WORKS

Many project managers consider the *PMBOK® Guide* to be the method for managing projects and carry it around as if it were some type of project management law book that must be followed. They profess that failure to follow the *PMBOK® Guide* will result in certain project failure and costly customer dissatisfaction. This type of thinking may result in a very inflexible approach to the management of the project and an attempt to force a technique or a process that is inappropriate for the project or that will cause unneeded work and possibly team frustration. This approach will, in many cases, result in resistance or even rejection of the *PMBOK® Guide* by management and the project team.

The first step in bringing the *PMBOK® Guide* to life is to understand that it is a guide (see Figure 1.1). The processes, tools, and techniques described in the document are meant to be considered and applied when *appropriate*. An inflexible attitude and approach in the use of the information provided in the *PMBOK® Guide* may result in considerable resistance by

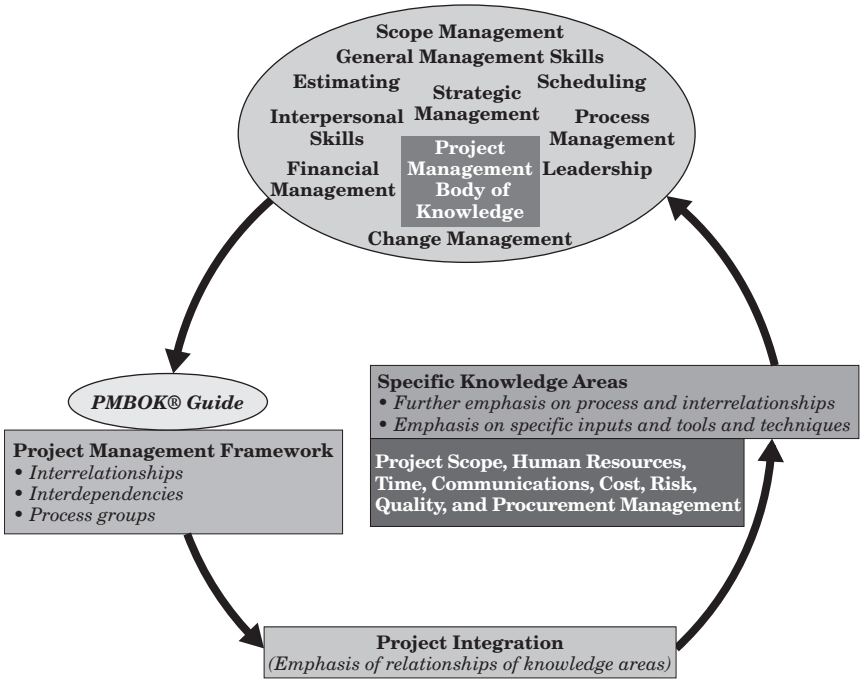

Figure 1.1 Project Management Life Cycle.

the project team or other stakeholders, a perception of inflexibility among team members about the project manager, challenges about the process, and possibly some undesired assistance from upper management or the project sponsor. To prevent this, it is important for the project manager and team to develop an understanding of how the *PMBOK® Guide* has been developed and structured and to review *each input, tool and technique,* and *output* within each process group described in each knowledge area and to understand their relationships and interdependencies during project planning and implementation:

Inputs. For all practical purposes, inputs are "things." They are generally deliverables (tangible work outputs) and are, in many cases, the outputs of other business or

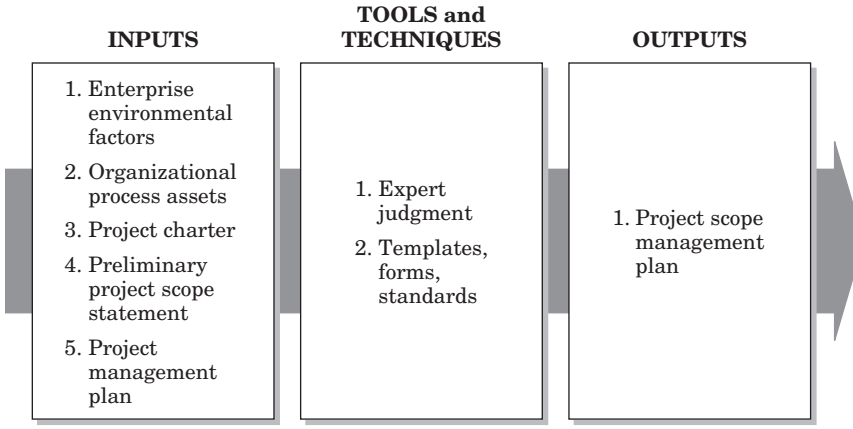

Figure 1.2 Process Flow for Scope Planning. *PMBOK® Guide*—Third Edition.

project management processes. Let's consider these to be *nouns*. They describe something tangible. These deliverables have specific names and were developed through the efforts of one or more people. It's important to understand what these inputs are, why they are required, and where they originate. Referring to Figure 1.2, enterprise environmental factors and organizational process assets are inputs to scope planning. Enterprise environmental factors include but are not limited to organizational culture, government standards, and infrastructure. Organizational Process assets include such items as policies, communication requirements, templates, project closure guidelines, and change control procedures. The project team should become aware of all environmental factors and organizational process assets that may affect the planning and control of the project. As an example, awareness of the organization's approach to risk—risk averse or aggressive risk taker (an environmental factor)—will impact how a plan is developed and how decisions about critical project issues will be made. This example

emphasizes the importance of having a thorough knowledge of all inputs to each process group.

Tools and techniques. These are the specific actions and supporting items that allow us to utilize the identified inputs required to meet project needs. To further explain the tools and techniques component of the process a simple analogy would be that these tools and techniques are what you would find in a project manager's toolbox. They are a set of enablers and are used to shape and from the inputs into useful outputs when handled correctly. Consider tools and techniques to be *input processors*, very much like a blender or food processor in a kitchen. Once you have determined what your objective is—a cake, a tossed salad, or a special sauce—the appropriate inputs or "ingredients" are gathered. The reason why the inputs are needed should be clearly understood—you should know why they are being used. The inputs are processed using the selected tools or techniques to produce a desired result (the outputs). This is a relatively simple explanation, but the objective of a project methodology should be to keep it as simple as possible, use the appropriate tools (making sure you know how to use them) and avoid processes that will overwhelm the project team or cause confusion.

Outputs. The results produced through the use of the tools and techniques become outputs. Outputs become tangible items or deliverables that will be used as inputs to another process or will be finalized for handoff and use by the intended customer or stakeholder.

The *PMBOK® Guide*, through these processes, emphasizes that in the project environment, the customer is actually the next person in the process and not just the organization or entity that will receive and pay for the product of the project. The inputs, tools

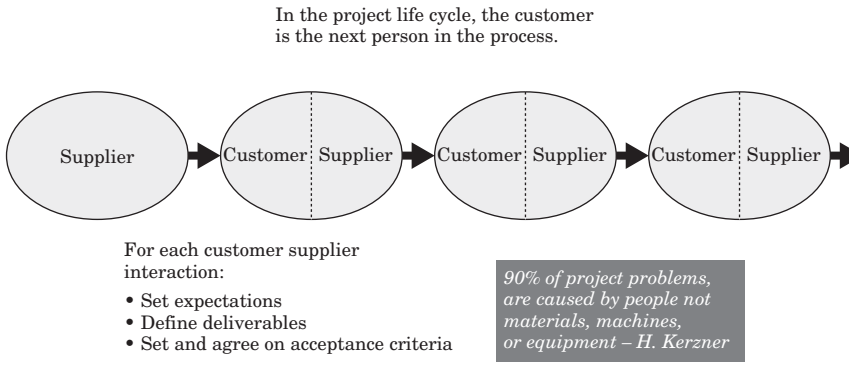

Figure 1.3 Project Customer–Supplier Model.

and techniques, and outputs create a project **customer–supplier model**. This model (Figure 1.3) refers to the fact that outputs of a process, the deliverables that are created using the tools and techniques, may be handed off to another project team member for further processing. This makes that particular team member or functional manager a customer. This handoff starts the next cycle of inputs, tools and techniques, and outputs. Maintaining focus on this model throughout the project life cycle will improve overall quality and planning efficiency, and should reduce project rework, resulting in improved overall performance and greater probability of success. It is important to note that each knowledge area in the *PMBOK® Guide* includes an overview of the inputs, tools and techniques, and outputs associated with that specific knowledge area. These overview charts present a type of "roadmap" of processes and illustrate relationships between process groups and other knowledge areas. The inputs, tools and techniques, and outputs found in one knowledge area may be included in the processes associated with other knowledge areas as part of a different process and different targeted result. This is a further indication of the integration of processes, and that concurrent planning of each project element or knowledge area is the norm for most projects. These overview charts also provide a means to

demonstrate clearly how each knowledge area is connected and *integrated* within the entire project management planning process and create a true systems approach to planning and executing the project.

KNOWLEDGE AREAS AND PROCESS GROUPS

Project managers are aware that most organizations achieve their objectives through operations, programs, and the completion of projects. Strategic goals are established, operations procedures are formed, and the resources of the organization are assigned to specific responsibilities—either to complete projects or to keep the organization operating. Programs are developed for managing long-term services, applications, and other essential elements for the business. Projects are approved and chartered to support programs, create new or update products or services and at some point in time to replace a program that has outlived its usefulness.

Projects and programs are a part of everyday life. Although many people don't realize it, project management in some form is used by almost everyone, regardless of profession or occupation. Projects include planning a vacation or remodeling a home, developing a new vehicle, constructing a new building, or sending a team of astronauts to the international space station. Governments utilize formal project management to update infrastructure, the military uses project management to plan battle campaigns, private businesses use project management to improve their competitive edge. Regardless of type of project or industry, the basic principles of project management are the same: Determine what must be accomplished or what problem must be solved, select the best, most cost-effective approach, pick a team, obtain funding, plan the project, execute the plan, manage variances, and eventually close out the project.

It sounds simple when stated like that, but any experienced project manager will tell you that it is much more involved. The challenge is to manage projects, especially large, complex undertakings, with smoothness, control, and without the bureaucracy and complications that seem to be included in the perceptions of some people when project management is discussed.

The ideas and principles of project management date back thousands of years. In the past fifty to sixty years, project management has become modernized and more formalized, and new tools have been added to manage projects as they became more complex. Today, there are dozens of planning software tools to choose from, training programs to hone skills, and systems that can be used at the enterprise level to more effectively integrate project activities with the operations of the organization. Project management processes are now becoming more and more common at the higher management levels of organizations and are considered by many to be a key component of strategic planning.

Project Management Processes

Strategic planning is used to determine the direction an organization should be moving in, create scenarios about the future of a business, and forecast out the condition or health of an organization one to three years. In some cases, it may be a longer view. The strategic plan is used to explain how the organization is going to achieve its desired goals and how it will know if it actually reached them. The focus of a strategic plan is usually on the entire organization, while the focus of a project plan is usually on a particular product, service, or program that will support the higher-level strategic plan. It is important to have a process in place that will provide the organization with the means to achieve the goals of the strategic plan. That means of achievement is project management. An organized approach with a

specific and defined process that is communicated to the stakeholders within the organization, supported by management, and followed through with minimal deviation should result in success at the project level and the organizational level.

Trying to start from the ground level and attempting to develop internal processes that can be used to achieve objectives is a long and challenging process. Many organizations start with an **ad hoc approach,** meaning "for the specific purpose, case, or situation at hand and not for any other reason." For unexpected situations and items that require a quick turnaround, the ad hoc approach may be appropriate and is probably used frequently within many companies. But the ad hoc approach does not address the longer-term needs of an organization and certainly does not promote the development of more stabilized and consistent processes. As companies mature in the management of projects, they begin to seek best practices that will help them reduce the learning curve and produce results at a faster pace. The *PMBOK® Guide* provides a basis for improved project planning by explaining key principles of project management and organizing project planning into a logical system that is integrated by processes. The nine knowledge areas of the *PMBOK® Guide*—integration, scope management, time management, cost management, quality management, Human Resources Management, communications management, risk management, and procurement management—are integrated through five processes—**initiating, planning, executing, monitoring and controlling,** and **closing.** The basic process groups are generally included in every phase of a project and provide the following:

1. *Initiating*. The purpose of the project is defined, the project is authorized, project managers are selected and teams are formed. The subprocesses within this group

are utilized in all project phases and serve as a way to determine if a project should proceed to the next phase.

2. *Planning*. The project objectives are established and developed through a progressive process of definition sometimes referred to as *progressive elaboration*. The project scope is defined in more detail, schedules are developed, procurement plans are defined, risks are identified, resource needs are identified, quality measures are determined, and communications plans are agreed upon.
3. *Executing*. The work defined in the project plan is initiated. The project manager coordinates activities, manages resources and subcontractors, procures goods and services, and observes project and team performance.
4. *Monitoring and Controlling*. The project team and project manager observe the work, analyze results, identify variances, and determine solutions and implement corrective action when necessary.
5. *Closing.* As each phase of a project is completed, a closing process is utilized to ensure that all deliverables have been completed to the satisfaction of the client and other stakeholders. At project completion, an analysis of project performance is conducted to ensure that all contractual obligations have been met, all work orders are completed, and any lessons learned are documented for use on future projects. The closing processes ensure formal acceptance of the project deliverables and that all project activities are finalized. The closing of a successful project should also include some type of recognition event for the project team. Recognition in some way is essential to maintain team loyalty. Project managers in many organizations will work with the same team members on multiple projects, and a good relationship with the team members will help to

minimize conflict and assist in influencing and motivating team members throughout the project life cycle.

These processes generally overlap in each phase of a project and interact throughout a project or phase, bridging and integrating elements of the nine knowledge areas. Process interactions are described in terms of the following:

- *Inputs* are documents, plans, designs, deliverables—generally something tangible.
- *Tools and techniques* are actions and approaches that are applied to the inputs.
- *Outputs* are documents, products, deliverables—tangible results of the applied actions. The outputs of many of these process interactions become inputs to other processes.

The *PMBOK® Guide* discusses inputs, tools and techniques, and outputs in each knowledge area chapter. As you proceed from chapter to chapter you will see many of the same inputs and tools and techniques being used in different processes. This is a clear indication of the integrated nature of projects. The inputs and tools and techniques described in the *PMBOK® Guide* may not be used in every project, but developing an understanding of why they may be needed will assist a project manager in minimizing the omission of critical project elements and planning components.

The Purpose of Inputs

Project managers should have an understanding about why an input is needed. Each input is basically an ingredient that is needed to complete a process and bring about a result. It is important to have some general knowledge of the origin of the

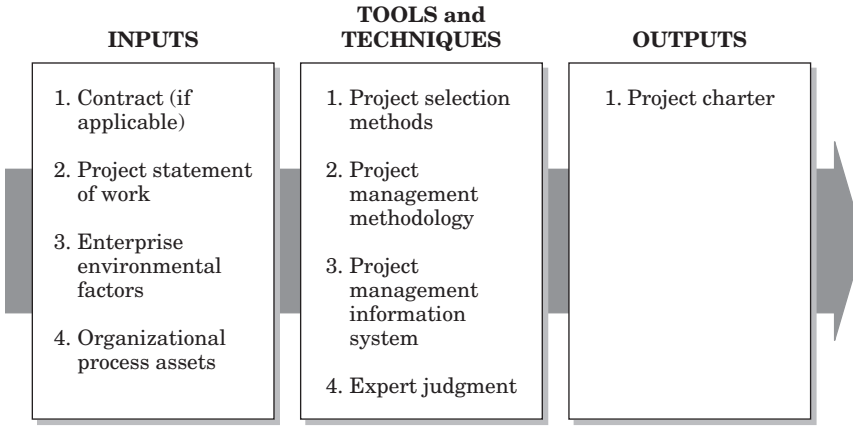

Figure 1.4 *PMBOK® Guide* 2004 Edition, Page 82.

input, how it was developed, and why it is needed. To further clarify, let's examine the inputs listed in Figure 1.4:

Contract. This is a legal document, the terms of which have been or will be agreed upon by the buyer and seller involved in a project. The contract may be an input in the project chartering process if the work to be done involves a supplier or vendor. The terms and conditions of the contract must be considered when making decisions about whether to approve a project. The risks, costs, and general terms and conditions should be reviewed in detail by the project manager and decision makers.

Project statement of work. The statement of work generally describes the specific work that will be done by a contractor. This information is also necessary when making project approval decisions.

Enterprise environmental factors. These factors are critical in the decision process and should be considered when determining which projects should be approved.

Enterprise environmental factors include the culture of the organization, government regulations and accepted business standards, the infrastructure and capabilities of the organization and many other factors. Any organization that is adopting formal project management methodologies should analyze the environmental factors that are specific to its company and industry and make sure these factors are considered throughout the planning and implementation of a project.

Organizational process assets. As organizations grow and mature, they will develop processes for doing business. These processes become part of the general operation for the organization and, in most cases, must be followed within the project environment as well. These process assets include safety procedures, purchasing processes, financial controls, and change control procedures. The project manager and team must be familiar with these processes to ensure compliance with internal rules and regulations and to prevent improper behavior that could result in injury, financial loss, or unnecessary expense.

Tools and Techniques

Project managers should possess some knowledge about the many tools and techniques that can be used to work with the inputs and process them to produce the desired outputs. The tools and techniques describe the necessary actions the team members or project manager will take and the specific items (the mechanism or device) needed to effectively process the inputs and produce a deliverable:

Project selection methods. These are the methods that may be used to determine which projects should be

approved and authorized for funding and use of organizational resources. Project selection methods include techniques such as determining payback period of an investment, the present value of a future investment, net present value, internal rate of return, and break-even analysis. The use of decision trees and other forms of mathematical analysis may be used to determine which projects will be approved by the organization. Project selection methods analyze the tangible as well as intangible benefits of a project.

Project management methodology. The use of an approved methodology (a particular procedure or set of procedures) will generally promote consistency and efficiency. Organizations that manage projects on a regular basis and as part of their business when dealing with clients will develop a project methodology and promote its use throughout the organization. Sometimes, methodologies are developed by reviewing the processes and steps taken by project managers and teams on previous projects.

Project management information system. This is a system of systems working together and used by the project manager and project team to gather, store, analyze, and disseminate information about the project. These systems may include time reporting systems, financial tracking systems, project management software, resource management systems, and any others that may be used to manage information.

Expert judgment. There are many ways to describe the reference to expert judgment. The experts, generally the functional managers and technical experts, are the subject matter experts that are consulted or included in the project team and provide suggestions, guidance,

estimates, and insights about risk, resource productivity, skills levels, and many other areas of importance.

Output

An *output* is the product of processing the inputs through the use of the tools and techniques. Outputs are deliverables and in many cases become inputs to several other processes. In this case, the output is a project charter:

Project charter. The charter is generally recognized as the document that authorizes the project to proceed, assigns the project manager, and begins the use of organizational resources. The project charter may be defined differently across industries. Any organization utilizing a project management methodology should have some type of document and/or process that clearly shows that a project has been authorized. An executive signature on a project charter or the project approval document can be a major influencing factor when it comes to obtaining resources and additional funding during negotiations.

As you can see, the *PMBOK® Guide* provides the basis for planning and presents a logical approach to produce an output or deliverable. In this example, using the process *Develop Project Charter* from the Integration Management chapter of the *PMBOK® Guide*, each input, tool and technique, and output is described in specific terms and from a project manager's perspective. In succeeding chapters the processes, tools and techniques, and other items that will help to accelerate planning will be explained in greater detail and through templates that are designed to efficiently expedite how a project is planned and managed.

THE *PMBOK® GUIDE*: LIFE FORCE FOR PROJECTS

The *PMBOK® Guide* can be used to assist in developing project plans and methodologies, but it is important to remember that it is a *framework* from which more detailed and customized project plans can be developed. If you try to use the *PMBOK® Guide* as the only means to manage a project, you will experience many challenges in your attempt to achieve project success. The *PMBOK® Guide* is arranged by knowledge areas and includes an explanation of the processes within each knowledge area. The knowledge areas are reviewed separately for explanation and learning purposes only. We don't manage projects by planning scope, time, cost, quality, risk, procurement, communications, and human resources separately. We all know that many planning processes are conducted concurrently, and there is a great deal of overlap in the processes we use. Using the combined information provided in the *PMBOK® Guide* along with some personal experience, logic, common sense and a touch of innovation—provides the basic formula for success. Let's call it "PMBOK®-based success."

You want your project to "live," to be seen for its value, to add to organizational effectiveness and the results to be used by the intended customers. If you think about it, your mission as a project manager is to bring your project to life, to obtain enthusiasm and commitment from your project team, and to achieve a feeling of accomplishment from your organization and gasps of awe from your customers. The *PMBOK® Guide* doesn't provide the excitement and drama experienced by novels such as Mary Shelley's Frankenstein. Nevertheless, your goal is to bring your project to life, just as Dr. Frankenstein proclaimed his project to be "*alive!*" His elation as he made this proclamation was, in a way, an indication of project success (or was it?). We certainly

don't want our projects to result in mayhem, fear, and a generally unhappy stakeholder group (the townspeople, in the novel). We are looking for success from the customer point of view—and team member satisfaction, as well. The *PMBOK® Guide*, if used properly and with the appropriate techniques applied, will provide a foundation for success and can bring your project to life in a logical and effective manner and bring about a true sense of accomplishment for all stakeholders.

THE *PMBOK® GUIDE* PROJECT PLAN ACCELERATOR (PPA)

The *PMBOK® Guide* provides a description and brief explanation of numerous tools techniques, and processes that may be utilized to develop a project methodology or to improve existing organizational processes intended to guide project teams and project leaders. This Project Plan Accelerator can be used to assist you in developing best practices for your organization by elaborating in more detail on the elements of the *PMBOK® Guide*. Using the *PMBOK® Guide* as a reference, you can create customized processes, identify essential tools and techniques your organization would benefit from using, and create templates that will improve overall project performance. The *PMBOK® Guide* is an excellent source for developing customized processes and methodologies that will bring consistency to the planning and execution of projects within an organization. The PPA basically connects the higher level, broader project management body of knowledge with the *PMBOK® Guide* and can easily become the foundation for creating processes that are specific and customized to an organization but relate to the standards described in the *PMBOK® Guide*.

How to Use the Project Plan Accelerator

The Project Plan Accelerator will create a bridge between the *PMBOK® Guide*, the greater project management body of

knowledge, and an actual project plan. Each item (input, tool or technique, output, process, etc.) discussed in the *PMBOK® Guide* that is targeted to be included in a project plan can be analyzed and further developed to ensure that the item is clearly documented, explained, and fully understood by the project team and other stakeholders.

Answering the Question: Why Do Project Managers Need This Book?

Here are some questions to consider for plan development and management of the project life cycle:

- Which elements of the *PMBOK® Guide* can be used to assist in developing a project plan or a subsidiary project plan for your project? Each chapter contains process information, descriptions of tools and techniques, definitions, lists, inputs, and outputs that could become key components of a project plan. Determine which elements, process groups, tool and techniques are most appropriate for your project.
- Which elements require additional research to ensure complete understanding and proper utilization?
- What tools or techniques are not applicable to the project? Why?

Consider the five process groups and the integration of the nine knowledge areas when developing your project plans and other project documentation. The emphasis should be on the relationships and interdependencies of the nine knowledge areas and how the five processes—initiating, planning, executing, monitoring and controlling, and closing—bring the knowledge areas together to form a systems approach to managing your project. Basically, every item in the *PMBOK® Guide* can be analyzed for inclusion in a project plan. Take any section of

the *PMBOK® Guide* and select an item. As an example, let's use the initiating process group:

> *Initiating process group*. Determine the specific actions or processes that should be applied to ensure that projects and project phases are authorized to proceed. Think of your current project work environment. Think of the enterprisewide factors that will influence these decisions. Identify the organization's processes that must be followed by the project team. Who are the key stakeholders that will make the decisions? What are the benefits associated with this project? Is there a business case with detailed information about the anticipated results? If the project is in progress, is it worth continuing to the next phase? Are the risks acceptable? Do you have enough funding? Are the variances acceptable?

For each component that has been selected, an analysis is completed to ensure that all major issues and questions have been identified. Once the questions have been asked or the issues raised, the next step to take action to resolve the issue. In some cases, additional research is required before a decision can be made. This process can be scaled to meet the specific needs of the project. We know that each project is unique, and it may not be necessary to use all of the processes, tools, and techniques that are available. However, using an approach like this actually helps to accelerate the planning process by organizing the elements that should be considered, analyzing each element to the appropriate level of detail and documenting the findings for reference later. This process will also create a very useful lessons-learned file and may help to improve many existing organizational processes. Think about projects you are currently engaged in. Where are the obstacles?

What project components or planning issues require additional detail or research? Make a note of these items for reference later.

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The Project Plan Accelerator can effectively identify the main issues a project manager and team may encounter during project initiation and through project execution and closure. As you can see in the example, the components necessary for project planning have been identified and listed. The component is then analyzed, actions are assigned, and the supporting detail is obtained. The complexity of the project will determine how much detail is needed to develop a solid, workable plan. The byproduct of the Project Plan Accelerator is that it will become a lessons-learned library or a series of supporting documents that will further improve the efficiency of the planning process.

PMBOK® Guide Component / Tool / Technique / Process	*Analysis, Implementation Activities, and Research Required*	*Person Responsible*	*Date Required*
Example: Enterprise environmental factors	Define the factors within the organization's environment that will have an impact on the project planning process. Example: What departments or organizations will be involved in the project? What cross-cultural issues must be considered (within the organization and external to the organization)? What government or industry standards or regulations must be considered during the planning process? How well will the organization's infrastructure support the project? What is the organization's tolerance for risk? How does this tolerance affect project planning?	Identify specific team members or stakeholders who will research the required information. Set expectations about how the information will be prepared and delivered.	
Example: Organizational process assets	Identify the processes that exist within the organization that must be followed—Include business related processes that may affect planning. What safety procedures must be in place for the project?		

	What quality assurance processes are currently in use and must be included in the project planning process? What is the organization's Quality Policy? Are project planning templates available? Where are they filed? What financial controls are in place within the organization for time reporting, tracking costs, progress payments, and allocation of funds?		
Example: The Project management office (PMO)	Define the current responsibilities of your organization's PMO. What processes have been defined? What training is available to project managers? What is the level of support provided by the PMO? What additional benefits may be gained by expanding (or creating) a PMO? What key measures of success have been identified by the PMO or should be tracked by the PMO?		
Example: Project constraints	What are the specific constraints associated with the project (schedule, resource availability, funding, skill levels, contractual items etc.)?		

(*continued*)

Project Plan Accelerator (*Continued*)

PMBOK® Guide Component / Tool / Technique / Process	*Analysis, Implementation Activities, and Research Required*	*Person Responsible*	*Date Required*
Example: Project management information system	What automated systems will be used to manage project information (project software, enterprise-level software, time reporting systems, financial reporting systems, document management systems, repositories)?		
Add components as needed and complete the columns and rows by developing and then answering questions about the project and the plan using the terminology described in the PMBOK® Guide.	Ask yourself why this planning component is important, and determine how much you should know about it. It is necessary? Why? How will you use it? Do you fully understand what it is, as well as its overall importance? Remember: The *PMBOK® Guide* provides information that *could* be used in project planning but some componenets may not be necessary for your project.		