Project Management

Portfolio, Programme, Project, PMOs, and Organization types

Lecture # 02

Risath. ALM

Project Portfolio Management

- As part of **project portfolio management**, organizations group and manage projects and programs as a portfolio of investments that contribute to the entire enterprise's success
- Portfolio managers help their organizations make wise investment decisions by helping to select and analyze projects from a strategic perspective.

Program and Project Portfolio Management

- A **program** is “a group of related projects managed in a coordinated way to obtain benefits and control not available from managing them individually” (PMBOK® Guide, Fifth Edition, 2012)

- A **program manager** provides leadership and direction for the project managers heading the projects within the program

- Examples of common programs in the IT field include infrastructure, applications development, and user support.

Portfolio, Program, and Project

Portfolio

A portfolio is a group of projects or programs that are linked together by a business goal. If an architecture firm was venturing into remodelling existing buildings as well as designing new ones, it might split its efforts into separate New Construction and Remodelling portfolios, since the goals for each are quite different.

Program

A program is a group of projects that are closely linked, to the point where managing them together provides some benefit. The firm knows from experience that creating huge skyscrapers is dramatically different than building residential homes, so residential home construction would be its own separate program.

Project

A project is any work that produces a specific result and is temporary. Projects always have a beginning and an end. Building a house is a classic example of a project. Projects can be part of programs or portfolios, but portfolios and programs can't be part of a project.

Projects in a program are often dependent on each other. Program management focuses on these interdependencies.

Try This….

A consulting company wanted to increase the amount of billable time for each consultant, so it started several company-wide programs to help consultants to get more productivity out of each year.

A company wanted to switch from a paper-based Human Resources group to a software-based one. It spent some time looking into the best software packages for the job, and decided to manage all of the HR functions together since it needed the same people to help with all of the work.

A software game company wanted to build up its online presence. It started several marketing and sales initiatives, created some new games, and rewrote some old ones in order to reach more gamers online.

A university wanted to build admissions websites for all of its departments. It realized that all of the sites would be feeding into the same registration interface and decided to manage all of them together in order to save time.

A company wanted to build a better reporting interface so that it could have more accurate data on year-end goals.

A construction company bid on several parking garage projects at the same time. It won one of the bids, and built the garage a month under schedule and $5,000 under budget.

Answers

A consulting company wanted to increase the amount of billable time for each consultant, so it started several company-wide programs to help consultants to get more productivity out of each year.

Portfolio

A company wanted to switch from a paper-based Human Resources group to a software-based one. It spent some time looking into the best software packages for the job, and decided to manage all of the HR functions together since it needed the same people to help with all of the work.

Program

A software game company wanted to build up its online presence. It started several marketing and sales initiatives, created some new games, and rewrote some old ones in order to reach more gamers online.

Portfolio

A university wanted to build admissions websites for all of its departments. It realized that all of the sites would be feeding into the same registration interface and decided to manage all of them together in order to save time.

Program

A company wanted to build a better reporting interface so that it could have more accurate data on year-end goals.

Project

A construction company bid on several parking garage projects at the same time. It won one of the bids, and built the garage a month under schedule and $5,000 under budget.

Project

Charter

Portfolios, programs, and projects all use charters

All of the work you do to initiate, plan, execute, control, and close your project helps your program and portfolio managers understand how your project is doing and keep it on track. Following all of the processes in the *PMBOK Guide* will ensure that the programs and portfolios of which your project is a part always know how you're doing and what you'll accomplish. While there are many differences in the documents that are used in portfolio and program management, all three use a **charter** to define their objectives.

Charter

Charter

Portfolios, programs, and projects all use a charter to define their goals and initiate work. A charter lists any known constraints and goals and gives the manager authority to get the work started.

Portfolio charter

A portfolio charter will lay out the strategic benefits that a portfolio is going to accomplish. It will list all of the programs and projects included in the portfolio.

Program charter

A program charter will define the shared benefit that the program is achieving as well as the list of projects it includes.

Project charter

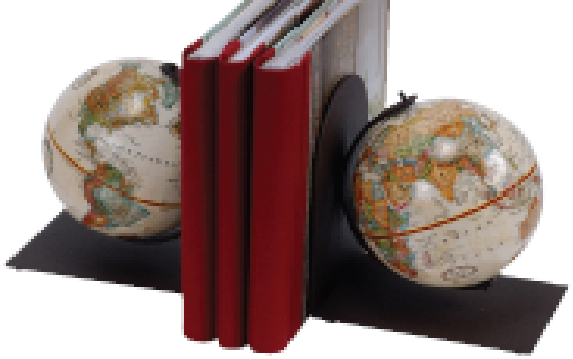
A project charter gives a project description, summary schedule, and business case, and assigns a project manager.

Project Management Office (PMO)

Project management offices help you do a good job, every time

Every project your company completes can teach you a lot about what works and what doesn't within your company's culture. **Project management offices** (PMOs) help you to learn from all of the work that's been done in the past. They'll give you the templates and the guidance you need to make sure your project takes the right approach and makes sense to everyone you work with. There are three different kinds of PMOs that you might run into in your career.

PMO: Three Types

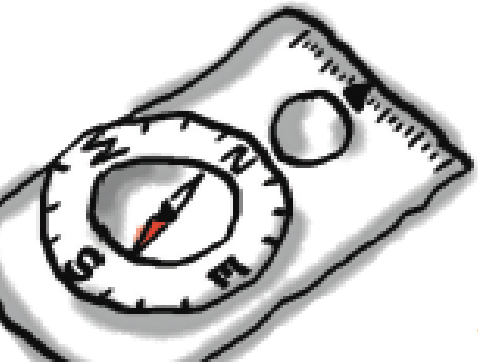


Supportive

PMOs that play a supportive role provide all of the templates you need to fill out while your project is under way. They'll lay out the standards for how you should communicate your project's scope, resources, schedule, and status as your project progresses from its initial stages through to delivery and closing.

Controlling

PMOs that control the way project management is done in a company will be able to check that you're following the processes they prescribe. Like supportive PMOs, they'll tell you what templates you should fill out and prescribe a framework for doing project management in your company. They'll also periodically review the work that you're doing on your project to make sure you're following their guidelines.



Directive

PMOs that take a directive approach actually provide project managers to project teams. In a directive PMO, the project manager usually reports to the PMO directly. That reporting structure makes sure that the project managers follow the frameworks and templates prescribed by the PMO, because their job performance depends on it.

Directive PMOs have a

Try This...

Which kind of project management office is being described?

1. Provides the process documents and templates for your project.

☐ Supportive ☐ Controlling ☐ Directive

2. You meet with them once a month to go over project docs and make sure you're following the right process.

☐ Supportive ☐ Controlling ☐ Directive

3. Provides a knowledge base of common project problems and lessons learned for you to use.

☐ Supportive ☐ Controlling ☐ Directive

4. A centralized group of project managers who are assigned to manage projects.

☐ Supportive ☐ Controlling ☐ Directive

5. When a project gets started, this group makes sure that they've followed all of the initiating processes and have the right approvals to start working.

☐ Supportive ☐ Controlling ☐ Directive

6. When you sit down to do your risk planning for your project, you go to them to find a good example of a risk plan that's been useful on other projects.

☐ Supportive ☐ Controlling ☐ Directive

7. This team audits your project work at regular intervals to confirm the status reports you're giving and guide you when you run into trouble.

☐ Supportive ☐ Controlling ☐ Directive

Answers on page 28.

Answers

Which kind of project management office is being described?

1. Provides the process documents and templates for your project.

☒ Supportive ☐ Controlling ☐ Directive

2. You meet with them once a month to go over project docs and make sure you're following the right process.

☐ Supportive ☒ Controlling ☐ Directive

3. Provides a knowledge base of common project problems and lessons learned for you to use.

☒ Supportive ☐ Controlling ☐ Directive

4. A centralized group of project managers who are assigned to manage projects.

☐ Supportive ☐ Controlling ☒ Directive

5. When a project gets started, this group makes sure that the team has followed all of the initiating processes and have the right approvals to start working.

☐ Supportive ☒ Controlling ☐ Directive

6. When you sit down to do your risk planning for your project, you go to them to find a good example of a risk plan that's been useful on other projects.

☒ Supportive ☐ Controlling ☐ Directive

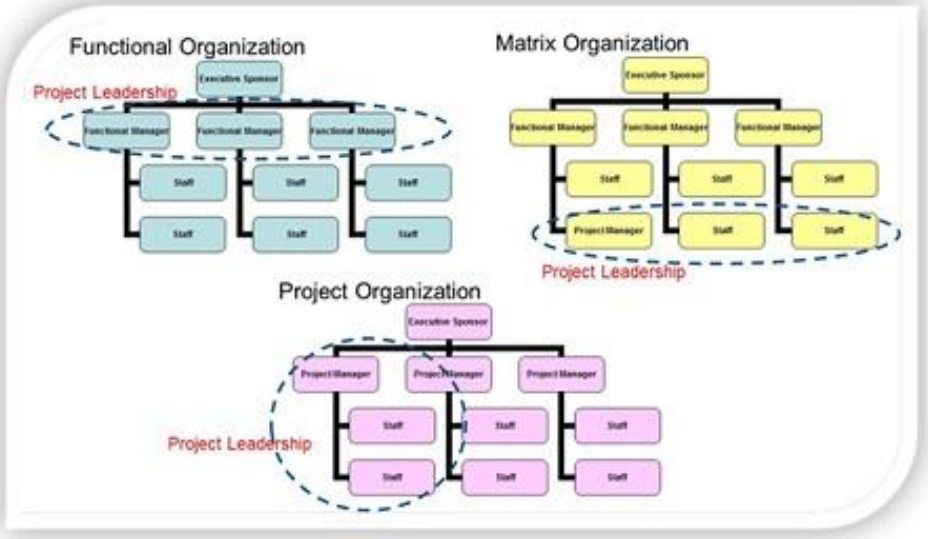
7. This team audits your project work at regular intervals to confirm the status reports you're giving and guide you when you run into trouble.

☐ Supportive ☒ Controlling ☐ Directive

Organization Types

There are different types of organizations

Kate's got three major options when looking at the kinds of organizations she can work for. **Functional organizations** are set up to give authority to functional managers, **projectized organizations** give it to the PM, and **matrix organizations** share responsibility and authority between the two.



Functional

In this kind of organization the project team members always report to a functional manager who calls all the shots.

- Project management decisions need to be cleared with functional managers.
- Project managers are assistants to the functional managers in getting the work done.
- Project managers spend a lot of time doing administrative tasks and often only work as PMs part of the time.
- You're likely to find project expediters in functional organizations.

All of the project work typically happens within a particular department, and that department's manager is completely in charge of everything.

Weak Matrix

- PMs have some authority, but they aren't in charge of the resources on a project.
- Major decisions still need to be made with the functional manager's cooperation or approval.
- Project expediters (like Kate) and project coordinators can work in weak matrix organizations, too.

Project coordinators are like expediters, except that coordinators typically report to higher-level managers and have some decision-making ability. Expediters have no authority at all.

Balanced Matrix

- Project managers share authority with the functional managers.
- PMs run their people-management decisions by the functional manager, but the functional manager runs his project decisions by the PM, too.

Folks who work in a balanced matrix organization report to a project manager AND a functional manager equally.

Matrix organizations

Strong Matrix

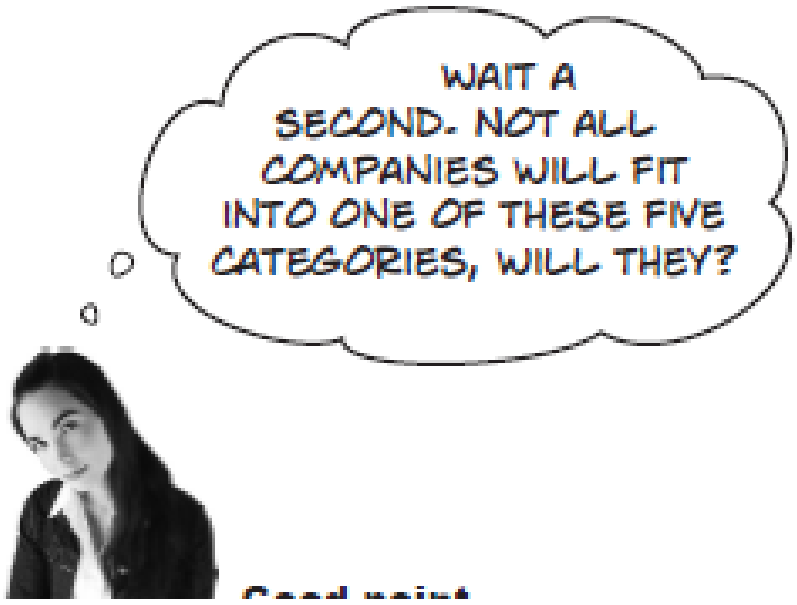
For the PMP exam, most questions assume that you work in a matrix organization unless they say otherwise.

- Project managers have more authority than functional managers, but the team still reports to both managers.
- The team might be judged based on performance on their projects, as well as on their functional expertise. In a strong matrix, delivery of the project is most important.

Projectized

If you've worked with a contractor or consulting company, they are usually organized like this

- Teams are organized around projects. When a project is done, the team is released, and the team members move on to another project.
- The project manager makes all of the decisions about a project's budget, schedule, quality, and resources.
- The PM is responsible for the success or failure of the project.



Good point.

Organization Types

Table 2-1. Influence of Organizational Structures on Projects

Organization Structure / Project Characteristics	Functional	Matrix			Projectized
		Weak Matrix	Balanced Matrix	Strong Matrix	
Project Manager's Authority	Little or None	Low	Low to Moderate	Moderate to High	High to Almost Total
Resource Availability	Little or None	Low	Low to Moderate	Moderate to High	High to Almost Total
Who manages the project budget	Functional Manager	Functional Manager	Mixed	Project Manager	Project Manager
Project Manager's Role	Part-time	Part-time	Full-time	Full-time	Full-time
Project Management Administrative Staff	Part-time	Part-time	Part-time	Full-time	Full-time

Functional Organization

The classic functional organization, shown in Figure 2-1, is a hierarchy where each employee has one clear superior. Staff members are grouped by specialty, such as production, marketing, engineering, and accounting at the top level. Specialties may be further subdivided into focused functional units, such as mechanical and electrical engineering. Each department in a functional organization will do its project work independently of other departments.

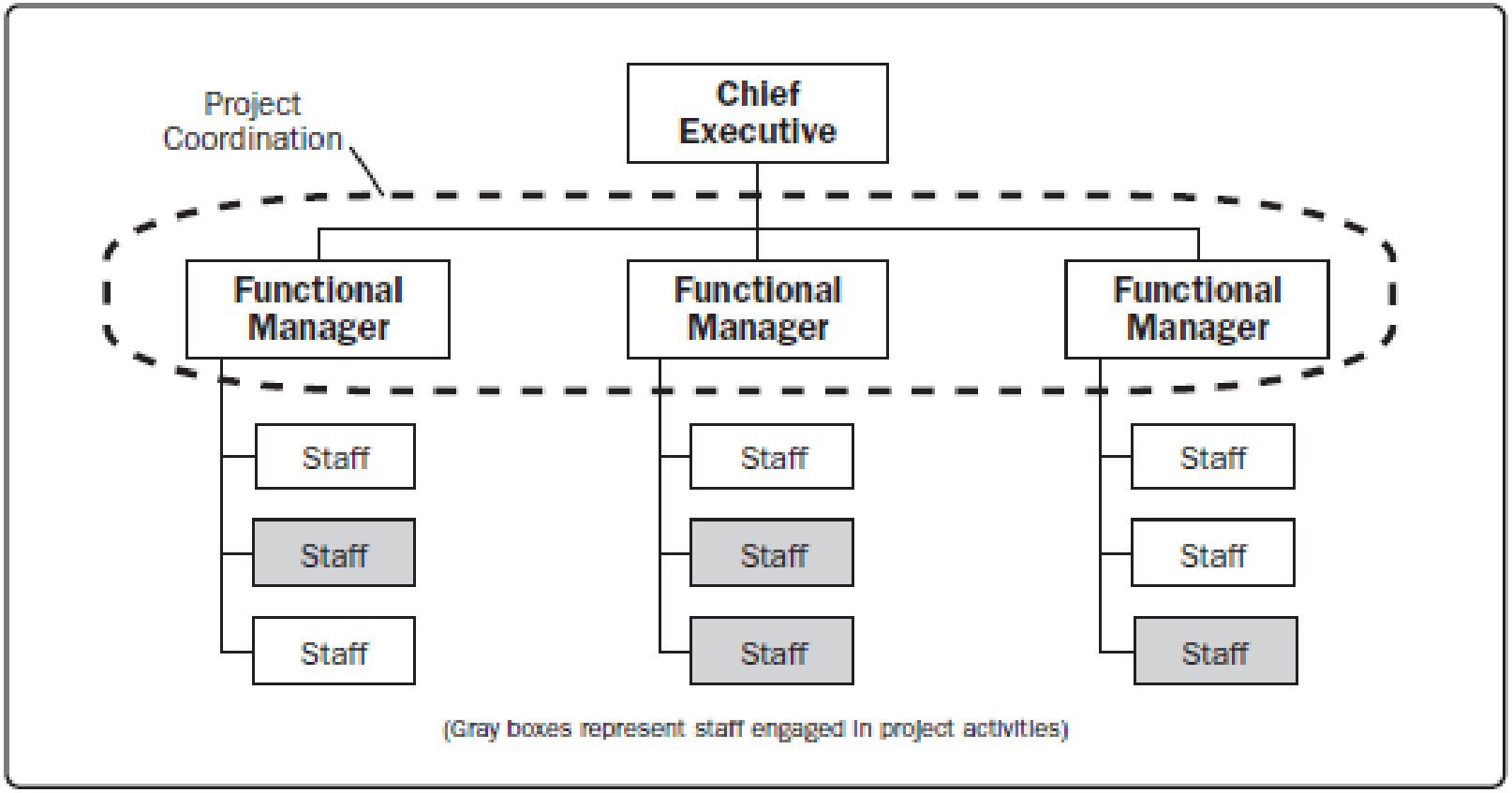


Figure 2-1. Functional Organization

Weak Matrix Organization

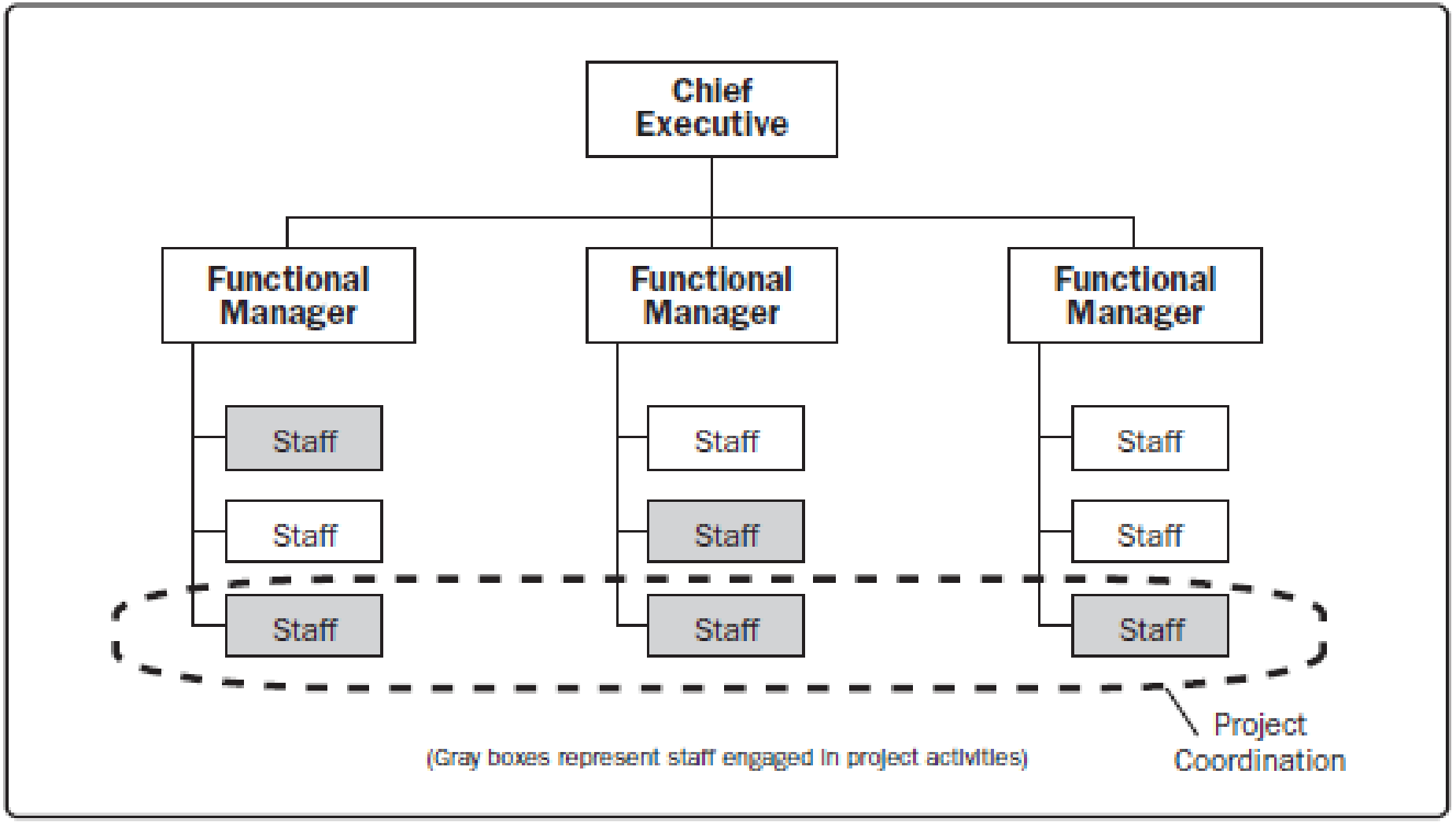


Figure 2-2. Weak Matrix Organization

Balanced Matrix Organization

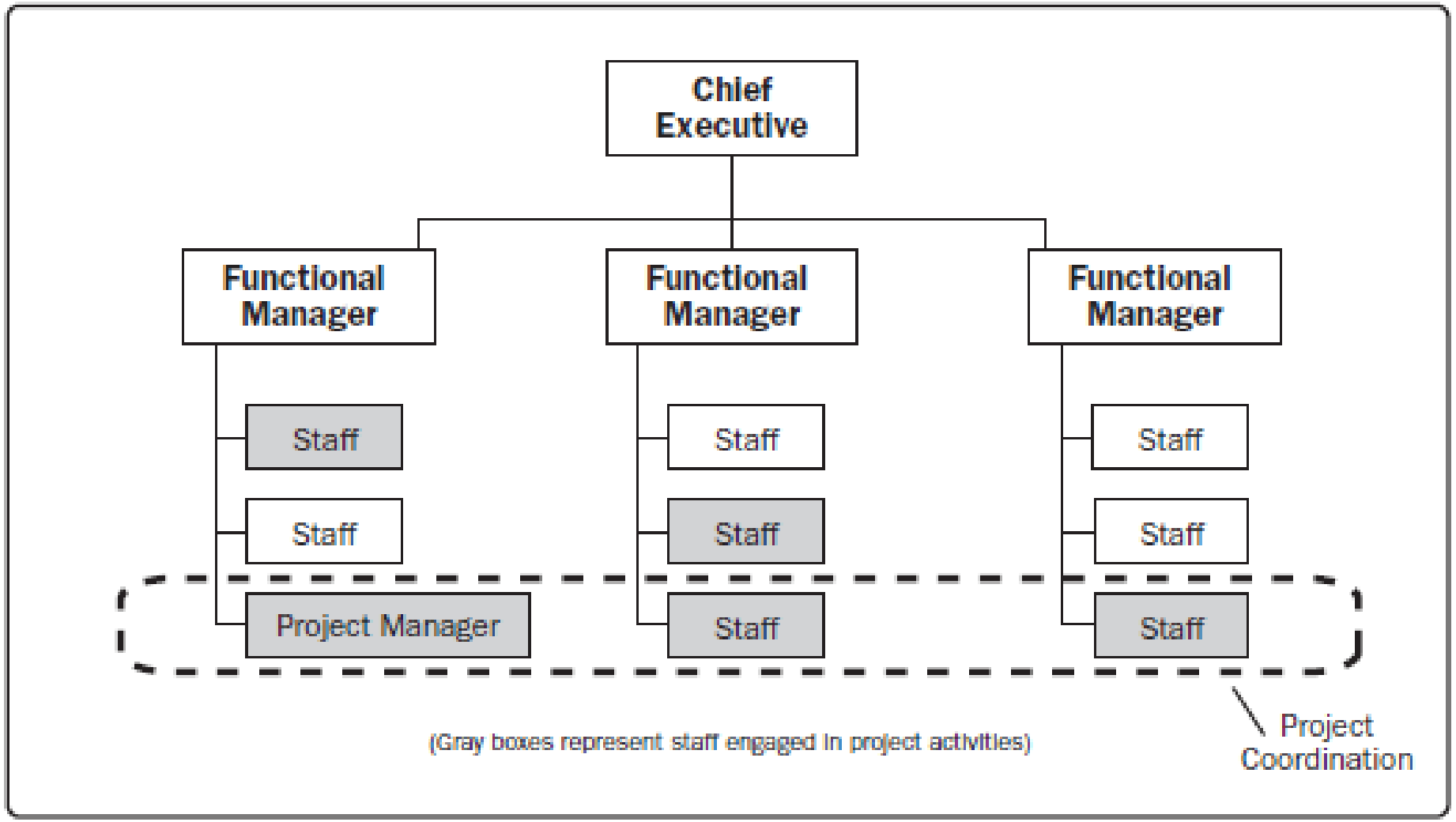


Figure 2-3. Balanced Matrix Organization

Strong Matrix Organization

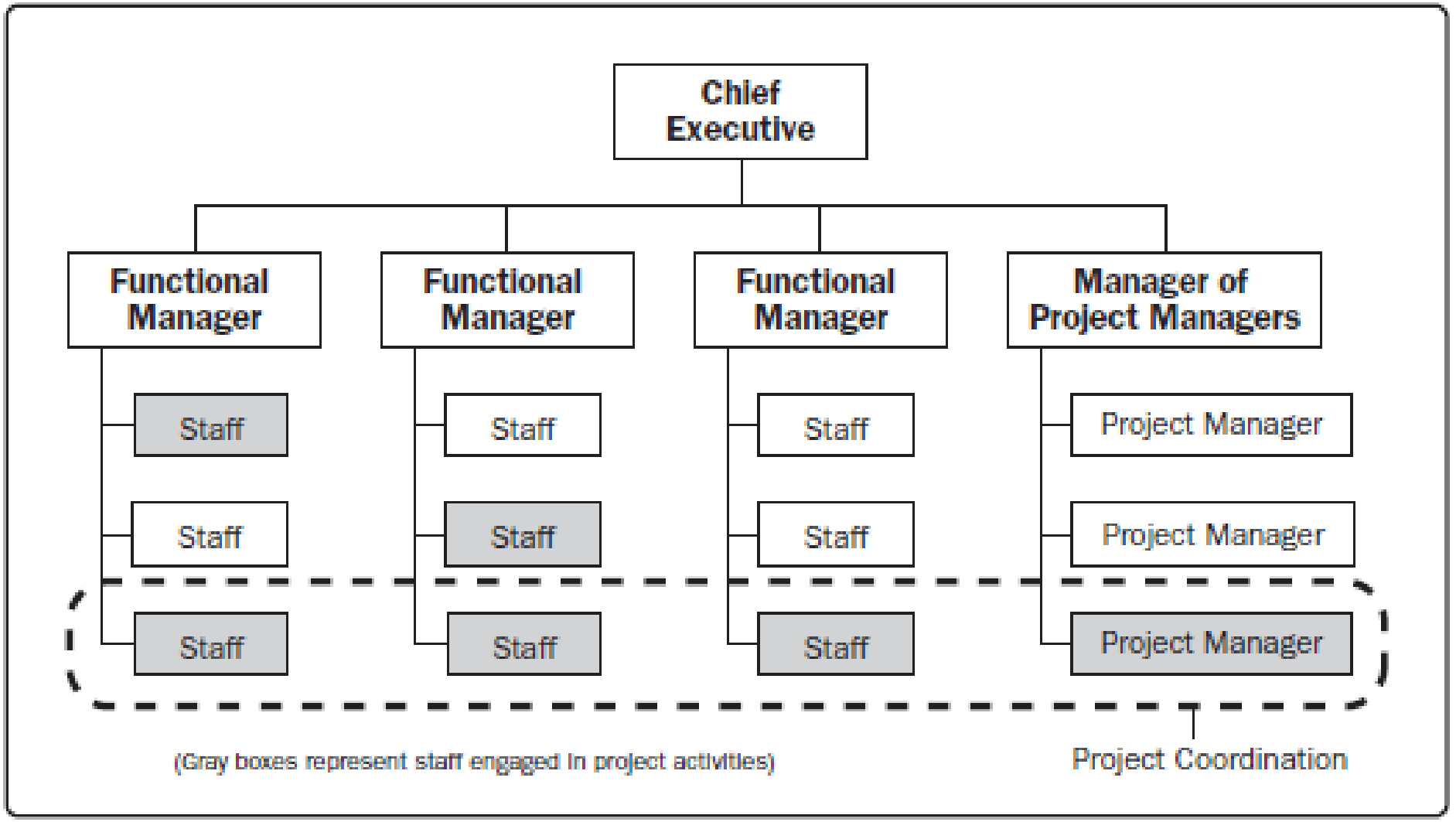


Figure 2-4. Strong Matrix Organization

Projectized Organization

At the opposite end of the spectrum to the functional organization is the projectized organization, shown in Figure 2-5. In a projectized organization, team members are often colocated. Most of the organization's resources are involved in project work, and project managers have a great deal of independence and authority. Virtual collaboration techniques are often used to accomplish the benefits of colocated teams. Projectized organizations often have organizational units called departments, but they can either report directly to the project manager or provide support services to the various projects.

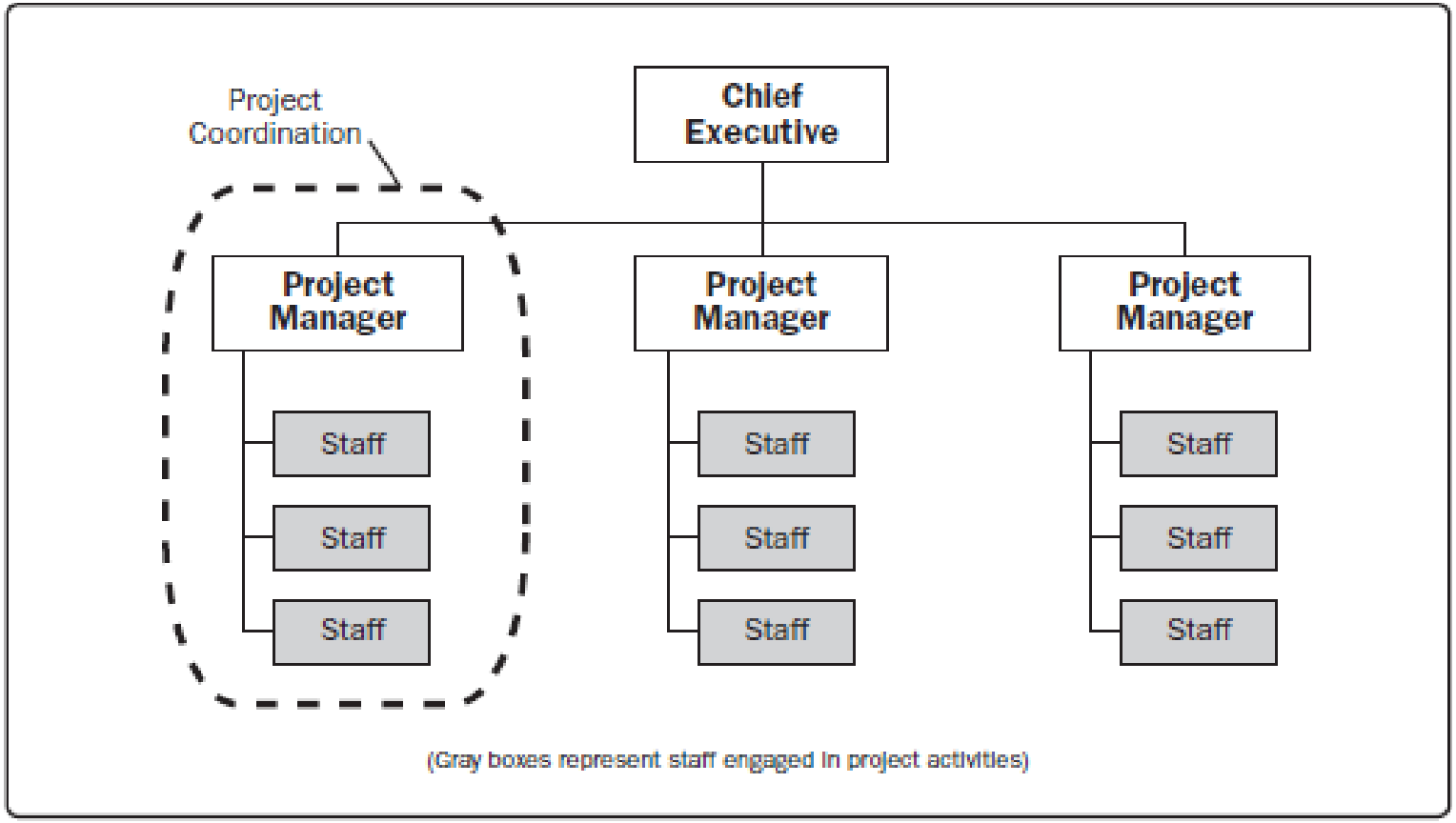


Figure 2-5. Projectized Organization

Try This.....

Functional organization

directly to the PM. Instead, the teams are in departments, and the project manager needs to "borrow" them for the project.

1. .....

2. .....

3. .....

Projectized organization

1. .....

2. .....

3. .....

Teams are organized around projects.

Project managers estimate and track budget and schedule.

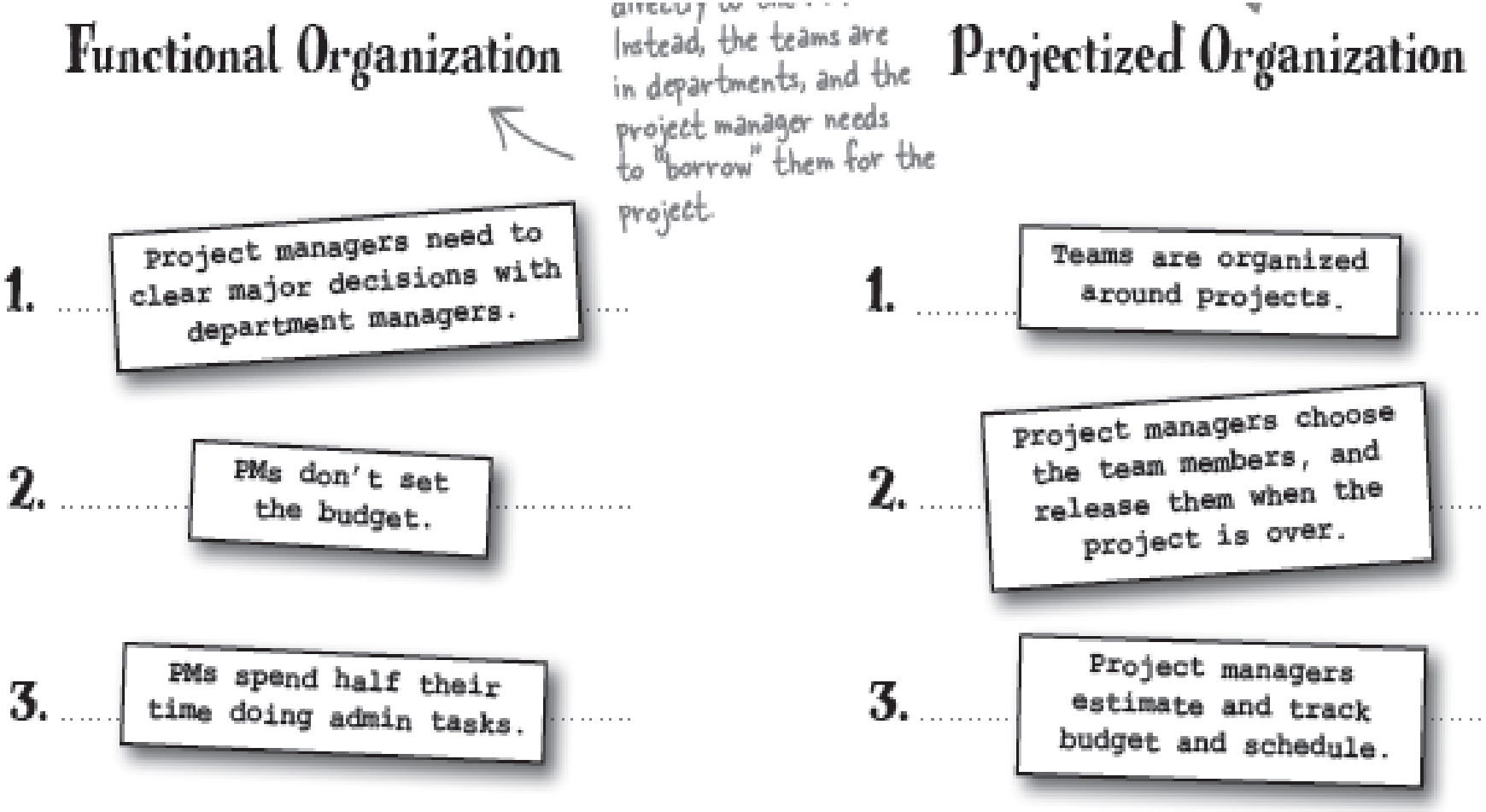
PMs don't set the budget.

Project managers choose the team members, and release them when the project is over.

PMs spend half their time doing admin tasks.

Project managers need to clear major decisions with department managers.

Answers


Functional Organization
Instead, the teams are in departments, and the project manager needs to "borrow" them for the project.
1. Project managers need to clear major decisions with department managers.
2. PMs don't set the budget.
3. PMs spend half their time doing admin tasks.
Projectized Organization
1. Teams are organized around projects.
2. Project managers choose the team members, and release them when the project is over.
3. Project managers estimate and track budget and schedule.

Organizational Process Assets

2.1.4 Organizational Process Assets

Organizational process assets are the plans, processes, policies, procedures, and knowledge bases specific to and used by the performing organization. They include any artifact, practice, or knowledge from any or all of the organizations involved in the project that can be used to perform or govern the project. These process assets include formal and informal plans, processes, policies, procedures, and knowledge bases, specific to and used by the performing organization. The process assets also include the organization's knowledge bases such as lessons learned and historical information. Organizational process assets may include completed schedules, risk data, and earned value data. Organizational process assets are inputs to most planning processes. Throughout the project, the project team members may update and add to the organizational process assets as necessary. Organizational process assets may be grouped into two categories: (1) processes and procedures, and (2) corporate knowledge base.

Processes and Procedures

2.1.4.1 Processes and Procedures

The organization's processes and procedures for conducting project work include, but are not limited to:

- *Initiating and Planning:*
  - Guidelines and criteria for tailoring the organization's set of standard processes and procedures to satisfy the specific needs of the project;
  - Specific organizational standards such as policies (e.g., human resources policies, health and safety policies, ethics policies, and project management policies), product and project life cycles, and quality policies and procedures (e.g., process audits, improvement targets, checklists, and standardized process definitions for use in the organization); and
  - Templates (e.g., risk register, work breakdown structure, project schedule network diagram, and contract templates).
- *Executing, Monitoring and Controlling:*
  - Change control procedures, including the steps by which performing organization standards, policies, plans, and procedures or any project documents will be modified, and how any changes will be approved and validated;
  - Financial controls procedures (e.g., time reporting, required expenditure and disbursement reviews, accounting codes, and standard contract provisions);
  - Issue and defect management procedures defining issue and defect controls, issue and defect identification and resolution, and action item tracking;

Processes and Procedures

- Organizational communication requirements (e.g., specific communication technology available, authorized communication media, record retention policies, and security requirements);
- Procedures for prioritizing, approving, and issuing work authorizations;
- Risk control procedures, including risk categories, risk statement templates, probability and impact definitions, and probability and impact matrix; and
- Standardized guidelines, work instructions, proposal evaluation criteria, and performance measurement criteria.

- *Closing:*
  - Project closure guidelines or requirements (e.g., lessons learned, final project audits, project evaluations, product validations, and acceptance criteria).

Corporate Knowledge Base

2.1.4.2 Corporate Knowledge Base

The organizational knowledge base for storing and retrieving information includes, but is not limited to:

- Configuration management knowledge bases containing the versions and baselines of all performing organization standards, policies, procedures, and any project documents;
- Financial databases containing information such as labor hours, incurred costs, budgets, and any project cost overruns;
- Historical information and lessons learned knowledge bases (e.g., project records and documents, all project closure information and documentation, information regarding both the results of previous project selection decisions and previous project performance information, and information from risk management activities);
- Issue and defect management databases containing issue and defect status, control information, issue and defect resolution, and action item results;
- Process measurement databases used to collect and make available measurement data on processes and products; and
- Project files from previous projects (e.g., scope, cost, schedule, and performance measurement baselines, project calendars, project schedule network diagrams, risk registers, planned response actions, and defined risk impact).

Environmental Enterprise Factors

2.1.5 Enterprise Environmental Factors

Enterprise environmental factors refer to conditions, not under the control of the project team, that influence, constrain, or direct the project. Enterprise environmental factors are considered inputs to most planning processes, may enhance or constrain project management options, and may have a positive or negative influence on the outcome.

Enterprise environmental factors vary widely in type or nature. Enterprise environmental factors include, but are not limited to:

- Organizational culture, structure, and governance;
- Geographic distribution of facilities and resources;
- Government or industry standards (e.g., regulatory agency regulations, codes of conduct, product standards, quality standards, and workmanship standards);
- Infrastructure (e.g., existing facilities and capital equipment);
- Existing human resources (e.g., skills, disciplines, and knowledge, such as design, development, legal, contracting, and purchasing);
- Personnel administration (e.g., staffing and retention guidelines, employee performance reviews and training records, reward and overtime policy, and time tracking);
- Company work authorization systems;
- Marketplace conditions;

Project Management Process Groups

3.1 Common Project Management Process Interactions

The project management processes are presented as discrete elements with well-defined interfaces. However, in practice they overlap and interact in ways that are not completely detailed in this document. Most experienced project management practitioners recognize there is more than one way to manage a project. The required Process Groups and their processes are guides for applying appropriate project management knowledge and skills during the project. The application of the project management processes is iterative, and many processes are repeated during the project.

The integrative nature of project management requires the Monitoring and Controlling Process Group to interact with the other Process Groups, as shown in Figure 3-1. Monitoring and Controlling processes occur at the same time as processes contained within other Process Groups. Thus, the Monitoring and Controlling Process is pictured as a "background" Process Group for the other four Process Groups shown in Figure 3-1.

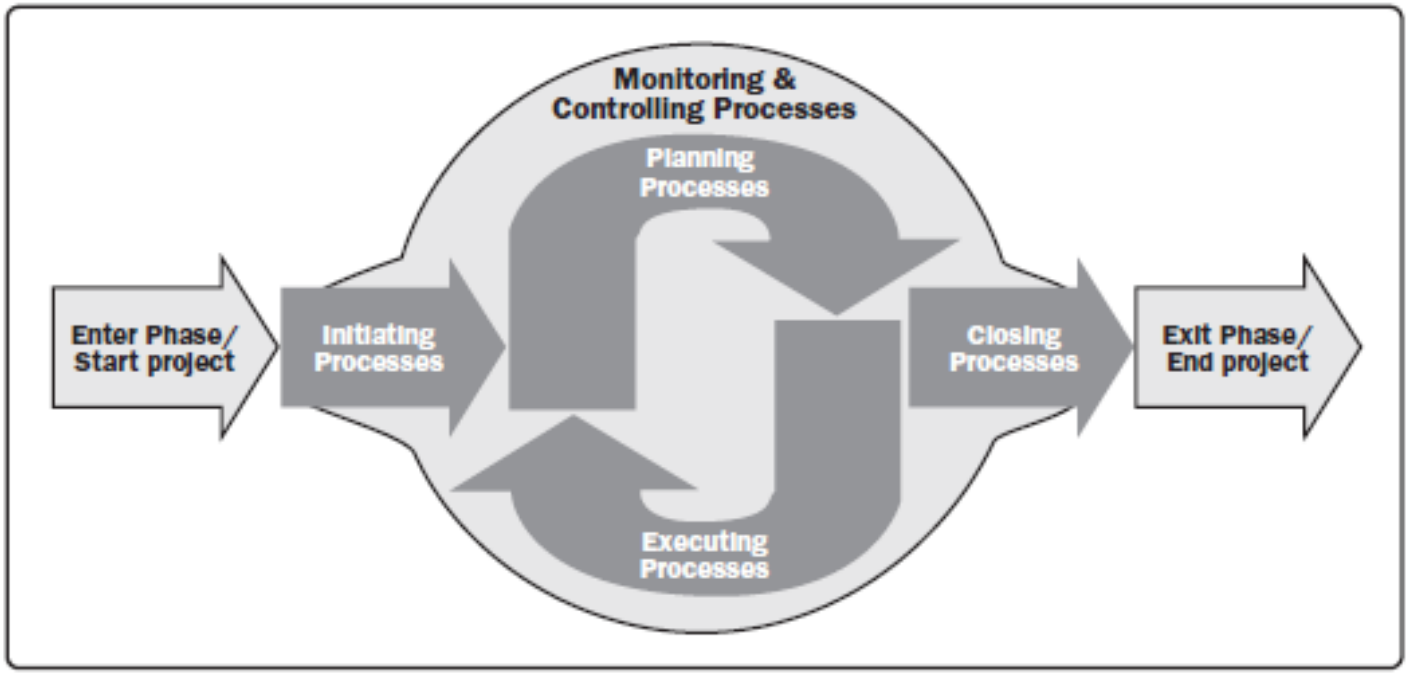


Figure 3-1. Project Management Process Groups

Process Group Interaction

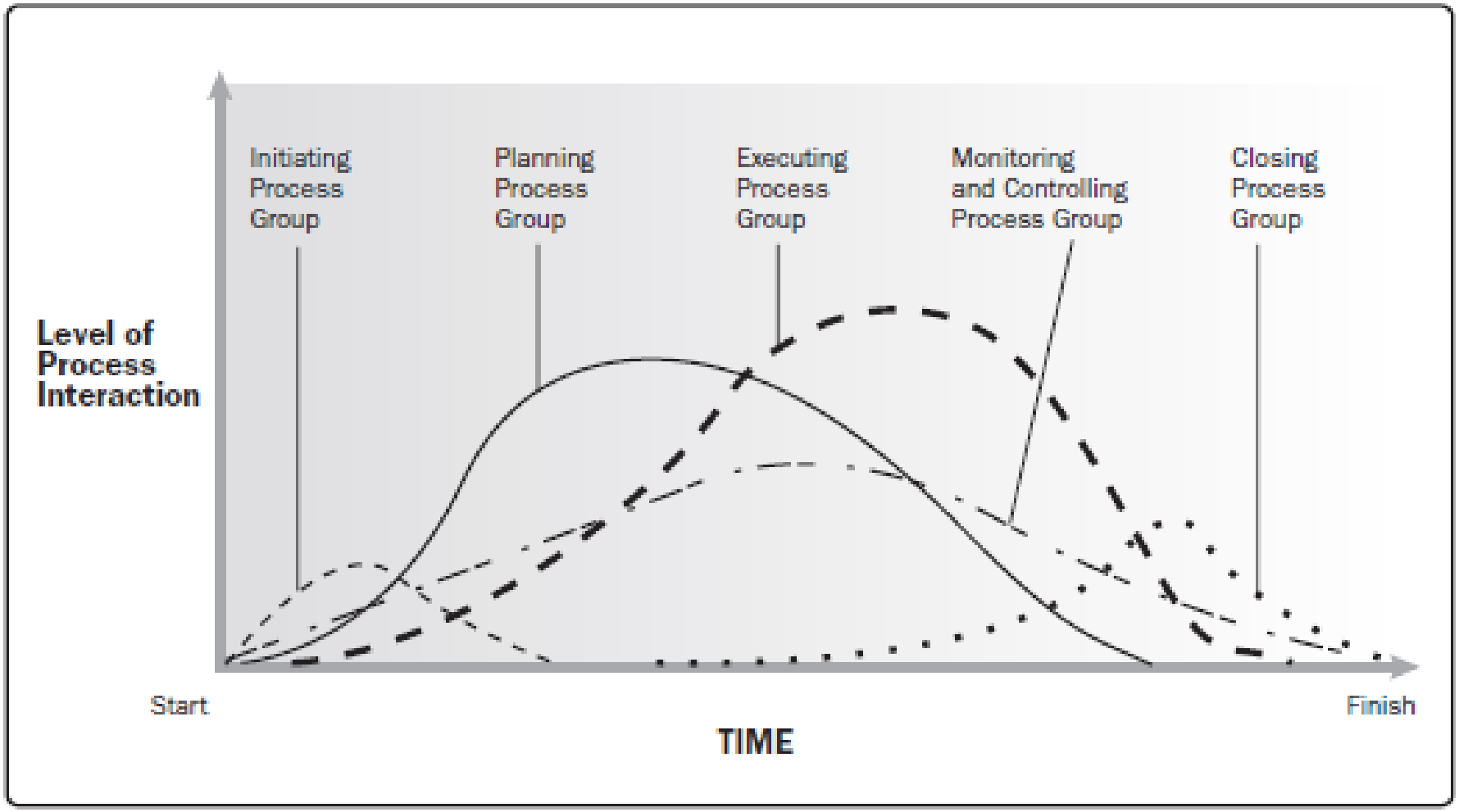
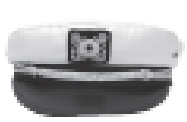


Figure 3-2. Process Groups Interact in a Phase or Project

Project Management Process Group
&
Knowledge Area Mapping

PMBOK (Page 87)

Knowledge Area/Phase	Initiation	Planning	Execution	Monitoring & Controlling	Close Out
1.0 Project Integration Management	1.1 Project Charter	1.2 Develop Project Mgmt. Plan	1.3 Direct & Manage Project Execution	1.4 Monitor & Control Project Work 1.5 Integrated Change Control	1.6 Close Project
2.0 Project Scope Management		2.1 Scope Management 2.2 Requirements Collection 2.3 Scope Definition 2.4 Create WBS		2.5 Scope Verification Scope Control	
3.0 Project Time Management		3.1 Schedule Mgmt. Planning 3.2 Activity Definition 3.3 Activity Sequencing 3.4 Activity Resource 3.5 Estimating Activity Duration 3.6 Estimating Schedule Development Schedule Control		3.7 Schedule Control	
4.0 Project Cost Management		4.1 Cost Mgmt. Planning 4.2 Cost Estimating 4.3 Cost Budgeting		4.4 Cost Control	
5.0 Project Quality Management		5.1 Quality Mgmt. Planning	5.2 Quality Assurance	5.3 Quality Control	
6.0 Project Human Resource Management		6.1 Human Resource Mgmt. Planning	6.2 Acquire Project Team Develop Project Team	6.3 Manage Project Team	
7.0 Project Communications Management		7.1 Communications Mgmt. Planning	7.2 Communications Mgmt	7.3 Communications Control	
8.0 Project Risk Management		8.1 Risk Management Planning 8.2 Risk Identification 8.3 Qualitative Risk Analysis 8.4 Quantitative Risk Analysis 8.5 Risk Response Planning		8.6 Risk Monitoring & Control	
9.0 Project Procurement Management		9.1 Procurement Planning 9.2 Contract Planning	9.3 Procurement	9.4 Procurement Control	9.5 Procurement Closure
10.0 Project Stakeholder Management	10.1 Identify Stakeholders	10.2 Stakeholder Management Planning	10.3 Stakeholder Engagement Management	10.4 Stakeholder Engagement Control	



Initiating process group

Planning process group

Executing process group

Monitoring & Controlling process group

Closing process group

Develop project management plan

Direct and manage project work

Plan quality management

Develop project charter

Control schedule

Monitor and control project work

Estimate activity durations

Control scope

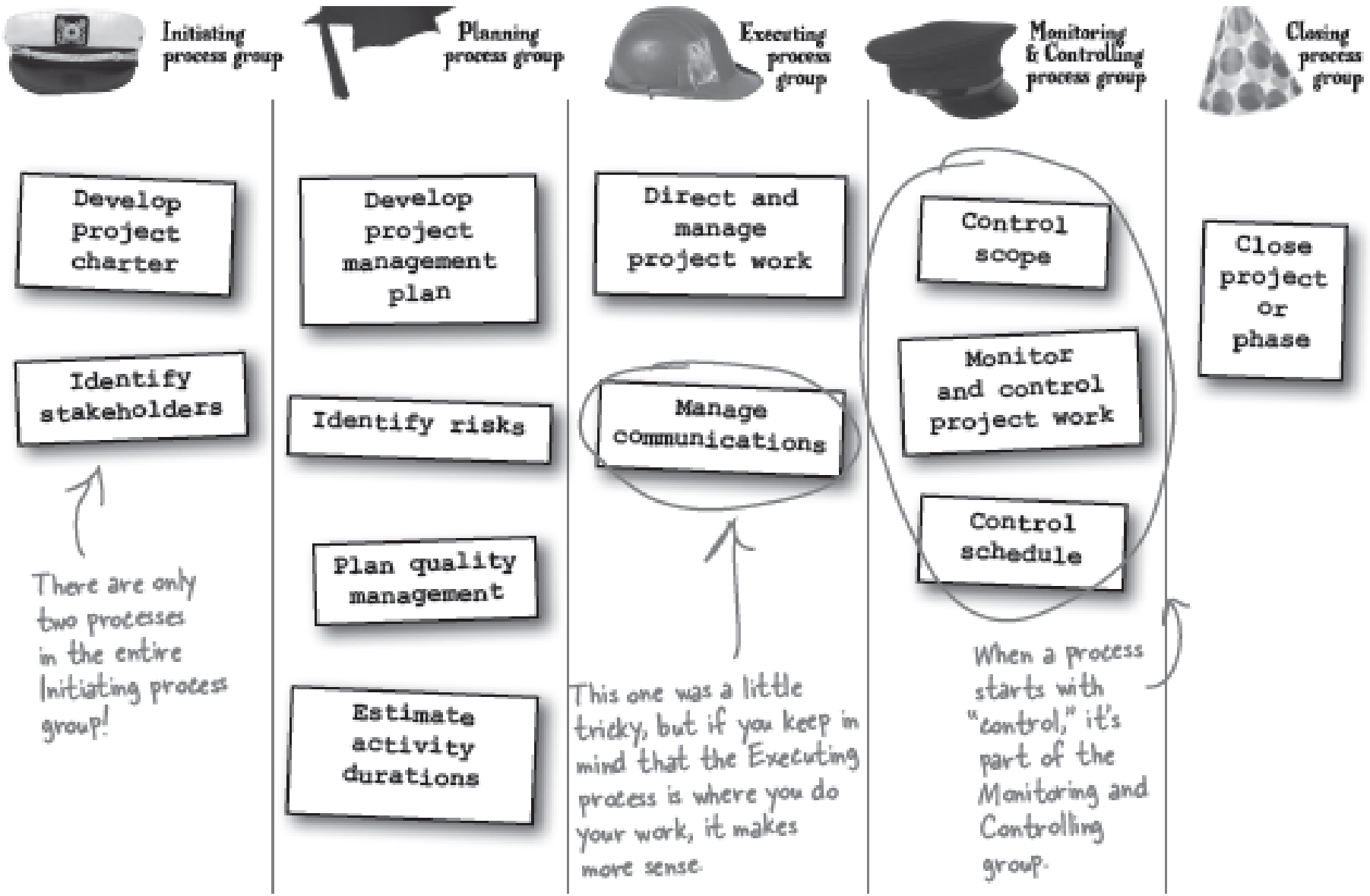
Manage communications

Identify stakeholders

Identify risks

Close project or phase

Answers


Initiating process group
Planning process group
Executing process group
Monitoring & Controlling process group
Closing process group
Develop Project charter
Identify stakeholders
There are only two processes in the entire Initiating process group!
Develop project management plan
Identify risks
Plan quality management
Estimate activity durations
Direct and manage project work
Manage communications
This one was a little tricky, but if you keep in mind that the Executing process is where you do your work, it makes more sense.
Control scope
Monitor and control project work
Control schedule
When a process starts with "control," it's part of the Monitoring and Controlling group.
Close project or phase

Initiating Process Group

Initiating Process Group

Initiating Process Group

Project Integration Management Knowledge Area

Develop Project Charter

The project kicks off with Develop Project Charter. This is the process that develops a document that formally authorizes the project and gives the Project Manager (PM) authority to use organizational resources. The key benefit is that we get a well-defined project start, an official record, and a way for senior management to formally commit to the project. For external projects, a contract takes the place of a charter.

A PM is assigned as early as possible — preferably while the charter is being developed and always before planning starts. The charter should be written by the sponsor. Projects are initiated by those external to the project e.g. sponsor or PMO.

4.1 Develop Project Charter

.1 Inputs
- .1 Project statement of work
- .2 Business case
- .3 Agreements
- .4 Enterprise environmental factors
- .5 Organizational process assets

.2 Tools & Techniques
- .1 Expert judgment
- .2 Facilitation techniques

.3 Outputs
- .1 Project charter

Project Charter

Project Charter

4.1 Develop Project Charter

Develop Project Charter is the process of developing a document that formally authorizes the existence of a project and provides the project manager with the authority to apply organizational resources to project activities. The key benefit of this process is a well-defined project start and project boundaries, creation of a formal record of the project, and a direct way for senior management to formally accept and commit to the project. The inputs, tools and techniques, and outputs for this process are shown in Figure 4-2. Figure 4-3 depicts the data flow diagram of the process.

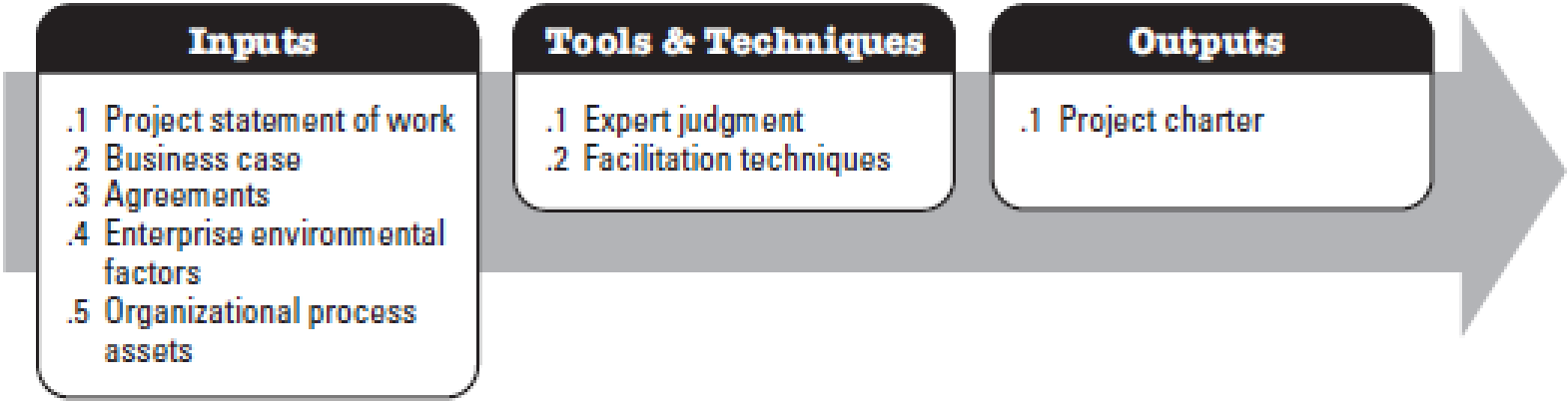


Figure 4-2. Develop Project Charter: Inputs, Tools and Techniques, and Outputs

Project Charter-Inputs

4.1.1 Develop Project Charter: Inputs

4.1.1.1 Project Statement of Work

The project statement of work (SOW) is a narrative description of products, services, or results to be delivered by a project. For internal projects, the project initiator or sponsor provides the statement of work based on business needs, product, or service requirements. For external projects, the statement of work can be received from the customer as part of a bid document, (e.g., a request for proposal, request for information, or request for bid) or as part of a contract. The SOW references the following:

- **Business need.** An organization's business need may be based on a market demand, technological advance, legal requirement, government regulation, or environmental consideration. Typically, the business need and the cost-benefit analysis are contained in the business case to justify the project.
- **Product scope description.** The product scope description documents the characteristics of the product, service, or results that the project will be undertaken to create. The description should also document the relationship between the products, services, or results being created and the business need that the project will address.
- **Strategic plan.** The strategic plan documents the organization's strategic vision, goals, and objectives and may contain a high-level mission statement. All projects should be aligned with their organization's strategic plan. Strategic plan alignment ensures that each project contributes to the overall objections of the organization.

Project Charter-Inputs

4.1.1.2 Business Case

The business case or similar document describes the necessary information from a business standpoint to determine whether or not the project is worth the required investment. It is commonly used for decision making by managers or executives above the project level. Typically, the business need and the cost-benefit analysis are contained in the business case to justify and establish boundaries for the project, and such analysis is usually completed by a business analyst using various stakeholder inputs. The sponsor should agree to the scope and limitations of the business case. The business case is created as a result of one or more of the following:

- Market demand (e.g., a car company authorizing a project to build more fuel-efficient cars in response to gasoline shortages),
- Organizational need (e.g., due to high overhead costs a company may combine staff functions and streamline processes to reduce costs.),
- Customer request (e.g., an electric utility authorizing a project to build a new substation to serve a new industrial park),
- Technological advance (e.g., an airline authorizing a new project to develop electronic tickets instead of paper tickets based on technological advances),
- Legal requirement (e.g., a paint manufacturer authorizing a project to establish guidelines for handling toxic materials),
- Ecological impacts (e.g., a company authorizing a project to lessen its environmental impact), or
- Social need (e.g., a nongovernmental organization in a developing country authorizing a project to provide potable water systems, latrines, and sanitation education to communities suffering from high rates of cholera).

Project Charter-Inputs

4.1.1.3 Agreements

Agreements are used to define initial intentions for a project. Agreements may take the form of contracts, memorandums of understanding (MOUs), service level agreements (SLA), letter of agreements, letters of intent, verbal agreements, email, or other written agreements. Typically, a contract is used when a project is being performed for an external customer.

4.1.1.4 Enterprise Environmental Factors

Described in Section 2.1.5. The enterprise environmental factors that can influence the Develop Project Charter process include, but are not limited to:

- Governmental standards, industry standards, or regulations (e.g. codes of conduct, quality standards, or worker protection standards),
- Organizational culture and structure, and
- Marketplace conditions.

4.1.1.5 Organizational Process Assets

Described in Section 2.1.4. The organizational process assets that can influence the Develop Project Charter process include, but are not limited to:

- Organizational standard processes, policies, and process definitions,
- Templates (e.g., project charter template), and
- Historical information and lessons learned knowledge base (e.g., projects, records, and documents; all project closure information and documentation; information about both the results of previous project selection decisions and previous project performance information; and information from the risk management activity).

Project Charter-Tools and Techniques

4.1.2 Develop Project Charter: Tools and Techniques

4.1.2.1 Expert Judgment

Expert judgment is often used to assess the inputs used to develop the project charter. Expert judgment is applied to all technical and management details during this process. Such expertise is provided by any group or individual with specialized knowledge or training and is available from many sources, including:

- Other units within the organization,
- Consultants,
- Stakeholders, including customers or sponsors,
- Professional and technical associations,
- Industry groups,
- Subject matter experts (SME), and
- Project management office (PMO).

4.1.2.2 Facilitation Techniques

Facilitation techniques have broad application within project management processes and guide the development of the project charter. Brainstorming, conflict resolution, problem solving, and meeting management are examples of key techniques used by facilitators to help teams and individuals accomplish project activities.

Initiation: Identify Stakeholders

Project Stakeholder Management Knowledge Area

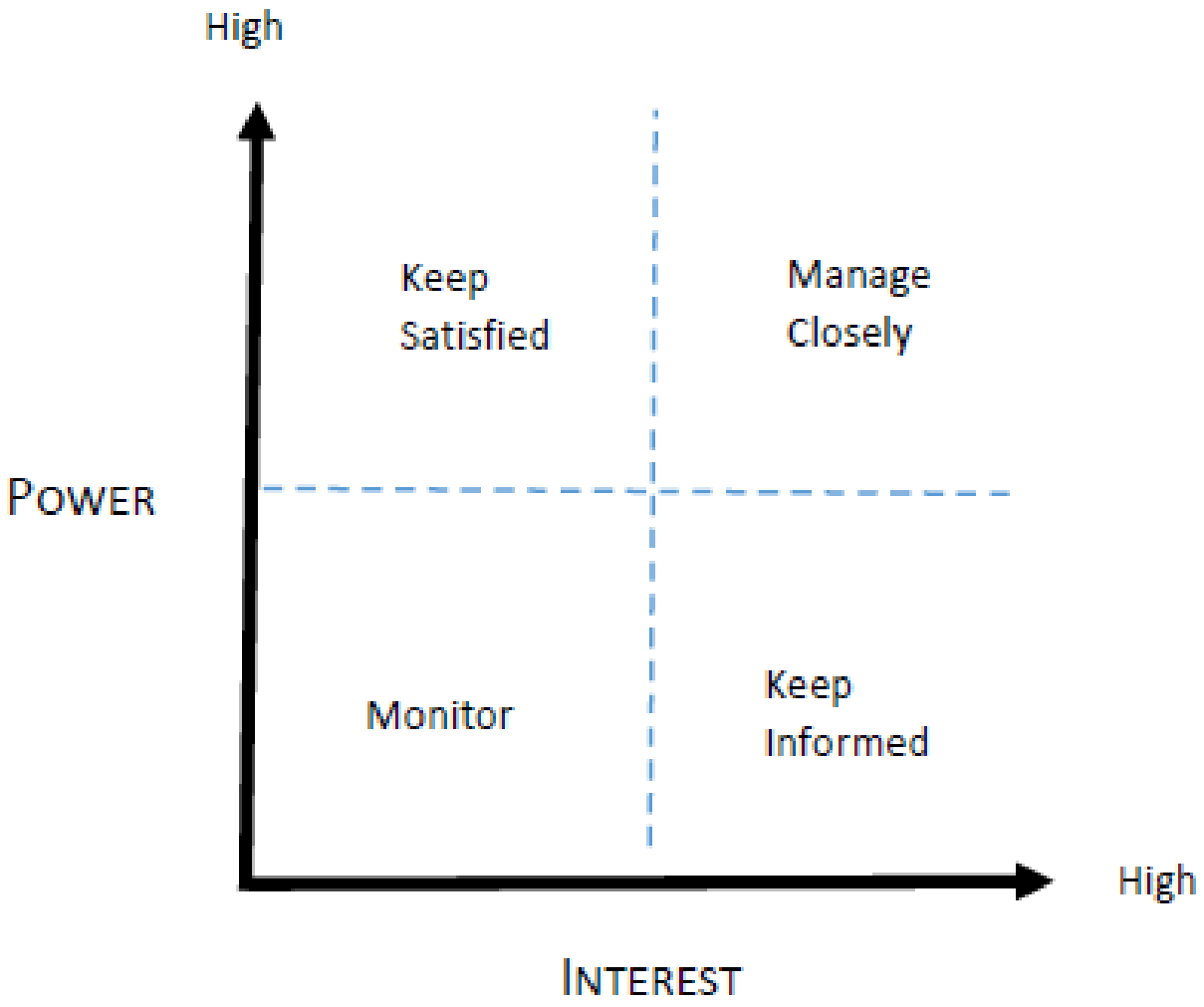
Identify Stakeholders

This process identifies anyone who could impact or be impacted by the project. Perceptions count, too. If they think they will be affected, then they are stakeholders. By *project*, we mean anything at all related to the work in hand e.g. decisions, outcomes, activities, etc.

Inputs	Tools & Techniques	Outputs
1. Project charter 2. Procurement docs 3. EEF 4. OPA	1. Stakeholder analysis 2. Expert judgment 3. Meetings	1. Stakeholder register

Identify Stakeholders ITTO

Stakeholder Power/Interest grid



Sample Stakeholder Register

Name	Position	Internal/ External	Project Role	Contact Information
Stephen	VP of Operations	Internal	Project sponsor	stephen@globaloil.com
Betsy	CFO	Internal	Senior manager, approves funds	betsy@globaloil.com
Chien	CIO	Internal	Senior manager, PM's boss	chien@globaloil.com
Ryan	IT analyst	Internal	Team member	ryan@globaloil.com
Lori	Director, Accounting	Internal	Senior manager	lori@globaloil.com
Sanjay	Director, Refineries	Internal	Senior manager of largest refinery	sanjay@globaloil.com
Debra	Consultant	External	Project manager	debra@gmail.com
Suppliers	Suppliers	External	Supply software	suppliers@gmail.com