Project Management IV - 4 1/2 Day
Project Execution, Monitoring, and Closedown

PDUs - 30

PMI's Talent Triangle Breakdown
Ways of Working - 13.50
Power Skills - 12.50
Business Acumen - 4.00

PMI's Certification Breakdown
PMP - 30.00
PMI-ACP - 16.50
PMI-SP - 16.50
PMI-RMP - 18.50
PfMP - 16.50
PMI-PBA - 16.50

face-to-face

virtual instructor-led

Course Description: Participants will focus on monitoring and executing the project while moving into the closedown phase of the project. Additional focus will be on problem solving and delivering quality customer service and value, regardless of if the customer is internal or external. Participants will discuss and participate in analysis of measuring the individual performance of team members. This section also focuses on how to properly hand the project off to the customer for effective transition. Phase IV is aligned with Project Management Institute's knowledge areas of the *PMBOK® Guide*. Each course will utilize both new content as well as best practices.

Method of teaching: Students will use discussion, cases, and group activities to facilitate the course.

Course Objectives:

Objective 1: Describe ways to communicate bad news
- Classify how to manage the project through influence rather than power

Objective 2: Summarize danger signals to watch
- Assess how to crash a project
- Apply close down checklists and handoff procedures
- Identify phase out of the project
- Perform a postmortem
- Review current hindrances facing organizations

Customer Service Module
Objective 3: Analyze why every project should be concerned about customer service
- Compare customer expectations to customer deliverables

- Define customer service for both internal and external customers in projects
- Evaluate customer expectations for projects
- Examine top customer complaints

Objective 4: Identify how to build credibility with customers
- Assess how to bond with customers
- Identify ways of persuading customers to provide more information
- Choose distinct connections every customer must receive

Objective 5: Rate human factors which mislead communication

- Analyze unspoken signals which distort communication
- Recognize how to put active listening to work
- Evaluate ways for handling problem customers
- Review methods for calming down irate customers
- Identify special care to the elderly or chronically ill
- Discuss feedback systems that work in projects
- Label warning signals that customer service is dying
- Identify five ways to improve your customer service in every project

Performance Module

Objective 6: Discuss advantages of performance management

- Identify performance needs
- Identify performance to project directives
- Analyze ways to communicate performance expectations in every project

Objective 7: Define ways in discovering the performance gap

- Classify benchmarking techniques of present performance
- Discuss training and the performance gap
- Examine questions to ask in determining project performance
- Discuss how to break down project performance into understandable steps
- Define how to map the performance map

Objective 8: Review monitoring of project performance indicators

- Show how to link operational goals to project performance
- Analyze mentoring roles in advancing project performance
- Examine the impact of incorporating best practices in project performance
- Evaluate how to create a project performance results matrix
- Develop a project performance development plan to transition team members toward peak performance

Procurement Module

Objective 9: Examine contracting process

- Discuss methods of contracting

Objective 10: Compare contracting types

- Describe evaluating and awarding contracts
- Discuss how to conduct a search for contract source

Objective 11: List price and budgeting requirements

- Examine interpreting changes
- Analyze termination of contracts
- Discover how to handle appeals and disagreements in a contract
- Examine contract closeout planning

Project Management IV Best Practices

INTRODUCTION TO EXECUTION
- What Happens During Project Execution?
- Project Control Process
- Preventing Problems is Better than Fixing Them

APPROVAL PROCESS
- What is the Approval Process?
- Contractor Payments

CONFIGURATION MANAGEMENT CHANGE, VERSION AND ISSUE MANAGEMENT
- What Happens During Project Execution?
- You Can't Manage What You Don't Control
- The Change Control Form
  Phase 1 - Requester Information
  Phase 2 - Initial Review of the Change Request
  Phase 3: Initial Impact Analysis
  Phase 4: Final Review Results and Change Priority
- What is Issue Management
- The Issue Resolution Form
  Phase 1 - Requester Information
  Phase 2 - Initial Review of the Issues
  Phase 3: Tracking
  Phase 4: Final Review Results and Change Priority

CORRECTIVE ACTIONS
- The Best of Plans Can Go Wrong
- Where Problems Come From
- Fix the Problem with a Recovery Plan

PROJECT REVIEWING
- Review Process
- Informal Review Process
- The Status Review
- Team Meetings
- Executive Meeting
- Link to Change, Issue, and Quality Management

RISK MONITORING AND MITIGATION
- Preventing Problems
- What is After Risk Assessment?
- The Evolution of Risk Control
- Risk Monitoring is an Iterative Process
- Risk Manager
- Risk Meetings
- Ongoing Risk Identification
- Focus on Key Risk
- Risk Resolution
- Historical Record

TRACKING AND MONITORING PROJECT PERFORMANCE
- Introduction to Project Tracking and Monitoring
- The Project Plan as the Road Map
- The Project Plan as the Baseline
- Why Tracking and Monitoring?
- How and What is to be Tracked
- When Should Tracking be Done?
- Activity and Schedule Tracking
- Monitoring
- Planned Versus Actual Costs
- Cost Determination
- Update the Cost Model
- Document Assumptions
- Tracking and Monitoring Costs
- Estimate at Completion (EAC) Summary Report

- Financial Metrics
- Resource Loading Updates
- Steering Committee
- Independent Reviews
- Periodic Updates
- Managing External Project Managers

PROJECT CLOSE-OUT INTRODUCTION

- Overview

POST IMPLEMENTATION EVALUATION REPORT AND ARCHIVING

- What is a Post Implementation Evaluation Report?
- Identifying and Addressing Success
- Who Prepares the Report?
- Collecting Project Data
- Where is the Archive Maintained
- How is the Archived Material Used?

RECOGNITION AND CELEBRATION OF SUCCESS

- Recognition of Success
- What is Success?
- Conduct a Lessons Learned Session
- Document Lessons Learned