



PM Notebook

Summarizing Project Management Concepts for the PMP Exam

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No great man ever complains of want of opportunity.
Ralph Waldo Emerson

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CHAPTER 3 – THE PROCESS FRAMEWORK

Phases

Projects that are big, or complex, or simply need to be done in stages because of external constraints can be divided into **phases**. Each phase must go through the five process groups and must have its own project charter.

Phase-to-Phase Relationship

Strongly influences how requirements are managed.

Sequential Relationship – Each phases starts when the previous is 100% complete.

Overlapping Relationship –

- When **multiple teams** need to work independently on different parts of the project.
- Next phase may begin before the end of the previous phase.
- **Introduces risk due to potential rework.**

Iterative Relationship –

- When a **single team** starts planning for the next phase occurs while executing the previous phase.
- Very common in **agile software development**.

Process Groups

The process groups help you organize the processes by the kind of work you do.

1. **Initiating** – Figure out project's high level goals. Create and define a preliminary version of your project's scope.
2. **Planning**
3. **Executing**
4. **Monitoring and Controlling** –
 - **Monitoring** – means collecting, measuring, assessing measurements and trends, and identifying areas that require special attention.
 - **Controlling** – means determining corrective and preventive actions, re-planning, following up action plans, and confirming actions have improved performance issues.
5. **Closing**

Knowledge Areas

The knowledge areas help you organize processes by the subject matter you are dealing with.

1. **Integration** – Keeping everybody working towards the same goals and dealing with changes.
2. **Scope** – What will and will not be done on project.
3. **Time**
4. **Cost**
5. **Quality** – The right product, the most efficient way.
6. **Risk** – Things that could happen (**positive or negative**).
7. **Procurement** – Contracts.
8. **Communication** – Keeping everybody in the loop.
9. **Resources**
10. **Stakeholder**

Project Management Plans

Knowledge Areas Management Plans

Benefits Management Plan –

- Created by the project sponsor and the PM.
- It is an economic feasibility study used to establish the validity of benefits.
- Documents the owner of the benefits.
- Defines what benefits the project will create, when the benefits will be realized, and how the benefits will be measured.
- Assumptions and risks considered in determining the benefit.

Change Management Plan – How change requests will be authorized and incorporated.

Configuration Management Plan – For managing changes to the deliverables and processes and the resulting documentation.

Process Improvement Plan –

- How processes that are used on the project to complete the work or perform project management activities will be evaluated and improved.
- Captures the details of activities he would be doing to enhance the **value** of the process, including their inputs, outputs, and interfaces with other processes.

Requirements Management Plan – How requirements will be gathered, analyzed, documented, and managed.

Work Performance

Work Performance Data (WPD) – The raw observations/data of the project's status before any analysis. It is the current status of various parameters. E.g. how much work is completed, how much time has elapsed, compliance of requirements, activities started/finished, etc.

Work Performance Information (WPI) – Performance data after analysis and processing. It is the data collected from various controlling processes, analyzed in context and integrated. E.g. status of deliverables, forecasted estimated to complete, etc.

Work Performance Report – A compilation of work performance info for consumption for some purpose (e.g. decision-making.)

- **Progress Report** – describes what has been accomplished.
- **Status Report** – describes where the project currently stands regarding performance measurement baseline. It is for **generating decisions, actions, and awareness**.
- **Forecast Report** – predicts future project status and performance.
- **Exception Report** – When there are variances.
- **Trends Report** – examines project results over time to see if performance is improving or deteriorating.
- **Earned Value Report** – integrates scope, cost, and schedule measures to assess project performance.

Additional Terms

ITTO – Inputs, Tools & Techniques, and Outputs