

*The PMBOK<sup>®</sup> Guide*  
- The Fourth Edition

# Harmonizing for PMI 25<sup>th</sup> Anniversary

- Updating 4 standards concurrently:
  - PMBOK
  - Program Management
  - Portfolio Management
  - OPM3
- ‘Look and feel’ the same
  - Same format
  - Consistent message
  - Consistent language
  - Aligned, not conflicting

# PMBOK® Instructions

- Revise the standard so that it would not conflict with any other PMI standards.
- Ensure that the information contained in the standard was cohesive in concept and clear in writing style, and that terminology was well defined and congruous with the other publications' terminology.

# PMBOK<sup>®</sup> Instructions

- Research the way life cycles are currently being used in projects and revise or expand the description as necessary.
- Examine the five project management process groups and the 44 project management processes to determine whether combining, deleting, or adding new processes would add clarity to the standard.
- Ensure that knowledge area updates are congruent with the work done in defining the processes, inputs and outputs defined by the standard group.

# Presentation Agenda

- Statistics
- Process changes
- Content clarification
- Editorial consistency
- New look
- Chapters
- Q & A

# Statistics

- 330 team members
- 37 countries
- 4425 comments
- 34 appeals received
- 344 pages of content, 475 total
- July 2006 to October 2008
- Denver to Denver!

# Process Changes

- What's new?
  - Collect Requirements
  - Identify Stakeholders
- What's gone?
  - Develop Preliminary Scope Statement
  - Plan Scope

# Process Changes

- What's different?
  - Process names to Verb Noun
  - Process descriptions are verbatim
  - Procurement went from 6 processes to 4 processes

# Process Changes

## Project Procurement Management

- Plan Procurements
  - Plan Purchases and Acquisitions
  - Plan Contracting
- Conduct Procurements
  - Request Seller Responses
  - Select Sellers
- Administer Procurements
- Close Procurements

# Content Clarification

- What is in a project scope statement vs. what is in a project charter?
- What goes in the project management plan vs. what do we use to manage the project?
- Change requests

# What is in a project scope statement vs. project charter?

- Product scope description
- Project deliverables
- User acceptance criteria
- Project boundaries
- Project constraints
- Project assumptions

- Purpose or justification
- Measurable objectives and related success criteria
- High-level requirements
- High-level description
- Summary milestone schedule
- Summary budget
- Approval requirements
- Project Manager, responsibility and authority level
- Authorizing person

# What goes in the project management plan

- Subsidiary plans and baselines e.g.
  - Requirements management plan
  - Communications management plan
  - Risk management plan
  - Procurement management plan
  - Scope management plan
  - Schedule management plan
  - Scope baseline
  - Schedule baseline
  - Cost performance baseline
  - Performance measurement baseline

# what do we use to manage the project?

- Project documents are used to assist the project manager in managing the project, they are not part of the project management plan.
  - Assumption log
  - Change log
  - Risk register
  - Duration estimates
  - Resource requirements
  - Source selection criteria

# Change requests =

- Corrective action
- preventive action
- defect repair
- requested changes

This revision helped to streamline the inputs and outputs of many processes while still providing the visibility of the various types of change requests.

# Editorial Consistency

- Consistent order for key inputs and outputs:
  - Inputs
    - Enterprise environmental factors
    - Organizational process assets
  - Outputs
    - Enterprise environmental factors updates
    - Organizational process assets updates
    - Change requests
    - Project management plan updates
    - Project document updates

# Editorial Consistency

- Consistent wording for key inputs and outputs

‘The following Enterprise Environmental Factors that can influence the [xyz] process:’

- brief description of how it influences the process
- brief description of how it influences the process

This is not a complete list, but these factors should be considered on most projects.

# Editorial Consistency

## *Project Document Updates*

Project documents that may be updated as a result of directing and managing the project include:

- Stakeholder register
- Issue log
- Risk log

This is not a complete list of documents that will be updated. The needs of the individual project will determine what will be updated.

# Editorial / Structural Consistency

- The project management plan is **not** an input to any planning processes
- The project management plan is an input to many executing and monitoring and controlling processes.
- The selected components that are inputs are described. ( baselines, subsidiary mgmt plans)

# The New Look

- Designed by Linda Westfall
- Each Knowledge Area Diagram shows
  - Inputs, their sources and with what process they interact
  - Outputs from each process and to which process they now go

# The Chapters

- Our Chief Architect, Geree Streun, developed an approach that would provide alignment across the three key standards.
- Alignment of the standards' format (not identical) for chapters 1 and 2.
- The information should be aligned and complementary, not conflicting.

# Chapter 1 Introduction

## Gabriel Xue

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Balancing the competing project constraints including, but not limited to:

- Scope Schedule Quality
- Budget Resources Risk

‘The specific project will influence the constraints on which the project manager needs to focus.’

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- Projects vs. other work (programs, portfolio, strategic planning and operations)
- Project Managers – skills and techniques

# Chapter 2 Project Lifecycles and Organization - Mark Wilfer

- Aligned with other standards
- Generic project life cycles
- Project Phases
- Roles of stakeholders
- New graphics

# Chapter 3

## Project Management Processes for a Project - Joe Kestel

- New graphics
  - project management process interactions
  - more emphasis on the integrating processes
- Process descriptions are now verbatim and Input/Output tables consistent with chapters
- Updated process group descriptions
  - (initiating, executing, closing)

# Chapter 4 Project Integration Management - Geree Streun

- Deleted Develop Preliminary Scope Statement
- Clarified Develop Project Management Plan and Close Project or Phase.

# Chapter 5 Project Scope Management – Joe Kestel

- Replaced Plan Scope with Collect Requirements
  - Based on SME knowledge of requirements definition processes
- Outputs from new process include:
  - Requirements management plan
  - Requirements documentation
  - Requirements traceability matrix

# Chapter 6 Project Time Management – Marie Gunnerson

- Reorganized chapter
- Deleted AOA
- PERT equation in Three point estimating
- Streamlined chapter = clarity for reader

# Chapter 7 Project Cost Management – Quentin Fleming

- PERT equation in Three point estimating
- Added to-complete performance index (TCPI) to Control Cost
- High-end EAC = consider schedule performance + cost performance when developing a forecast
- Greater alignment of 5.5 Control Scope, 6.6 Control Schedule, 7.3 Control Costs

# Chapter 8 Project Quality Management – Marylinda Jones

- Better descriptions of processes
- Key tools such as control charts and statistical sampling into moved to Plan Quality to assure funding for them.
- More graphics
- More discussion on cost of quality
- Deleted quality baseline

# Chapter 9 Project Human Resource Management - Vijay Verma

- Emphasize the importance of people skills and how these skills can add to better teamwork, communication and leadership
- Moved Manage Project Team from monitoring and controlling to executing
- Appendix with topics and references

# Chapter 10 Project Communication Management – George Jucan

- Added Identify Stakeholders to Initiating Group
- Outputs include:
  - Stakeholder register
  - Stakeholder management strategy
- Changed Manage Stakeholder process to Manage Stakeholder Expectations
- Moved from monitoring and controlling to executing.

# Chapter 11 Project Risk Management – Carl Pritchard

- “For every complex problem there is an answer which is clear, simple and wrong.”
- Remember that some things are just not simple
- Don't expect BIG change. Expect clarifying minor change. And expect some folks to find the clarifications less than clarifying.

# Chapter 12 Project Procurement Management – Quentin Fleming

- Went from six processes to 4 processes
- Renamed processes to center around procurements
- Introduced ‘teaming agreements’
- deleted “Cost-Plus a Percentage of Costs” fee contract types. Reason: illegal in most locations.

# New Appendix

- New appendix on interpersonal skills.
  - Leadership
  - Team building
  - Motivation
  - Communication
  - Influencing
  - Decision making
  - Political and cultural awareness
  - Negotiation

# Credential

# Updated Examination

- PMP® 30 June 2009
- CAPM® 31 July 2009
- PMI-SPSM 31 August 2009
- PMI-RMPSM 31 August 2009
- PgMP® 31 August 2009

# Translations

• Arabic	• Japanese
• Chinese (simplified)	• Portuguese (Brazilian)
• German	• Russian
• French	• Spanish
• Italian	• Korean

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Questions?

# Contact Information

Karen Rasmussen Noll

[nollk@sentex.net](mailto:nollk@sentex.net)

519 648 3263