

# Project Management III - 4 1/2 Day

## Execution, Monitoring, and Closedown

**PDU's - 30**

### PMI's Talent Triangle Breakdown

Ways of Working (Technical) - 9.25  
Power Skills (Leadership) - 5.75  
Business Acumen (Strategic) - 15.00

### PMI's Certification Breakdown

PMP - 30.00  
PMI-ACP - 20.75  
PMI-SP - 20.75  
PMI-RMP - 20.75  
PfMP - 20.75  
PMI-PBA - 20.75



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 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 III 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 which will be taught from the Best Practice Manual.

**Methods:** Students will use discussion, cases, and group activities.

### **Course Objectives:**

#### **Objective 1: Describe ways to execute and monitor the project process**

- Classify how to manage the project and negotiate various agreements
- Summarize execution dangers to consider
- Design performance methods for tracking and monitoring
- Examine high conflict considerations
- Assess how to procure vendors for a project
- Apply close down checklists and handoff procedures
- Perform a postmortem and lessons learned

### **Execution Module**

#### **Objective 2: Discuss the benefits of execution**

- Analyze a project execution methodology
- Identify the seven executing processes
- Assess the influences of managing in execution

- Review the hindrances to project execution
- Analyze escalation processes and policies

### **Negotiation Module**

#### **Objective 3: Analyze the benefits of negotiations**

- Examine killer mistakes in negotiations
- Evaluate three ways of bargaining
- Discuss the three views of preparation
- Identify techniques for personal preparation
- Assess preparation techniques to counter your opponent

#### **Objective 4: Design and arrange the first session**

- Review how and why to set parameters in project negotiations
- Classify techniques for handling emotionally charged issues

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- Identify standard negotiation funneling practices
- Design questions that benefit your position while working on projects
- Discuss words to use in the questions for greater impact

## **Objective 5: Analyze barriers to overcome during negotiations**

- Identify guidelines for examining the opponent's position
- Evaluate research techniques for checking out the opponent

## **Objective 6: Examine ways to overcome price objections in project resources**

- Discuss the benefits of reinforcing price before negotiations
- Analyze standard negotiation strategies
- Identify techniques to use to follow up after the deal is made

### ***Customer Service Module***

## **Objective 7: 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 8: Identify how to build credibility with customers**

- Assess how to bond with customers
- Choose distinct connections every customer must receive

## **Objective 9: Analyze unspoken signals which distort communication**

- Recognize how to put active listening to work

## **Objective 10: Choose ways for handling problem customers**

- Review methods for calming down irate customers
- Discuss feedback systems that work in projects
- Analyze warning signals that customer service is dying
- Identify five ways to improve your customer service in every project

### ***Performance Module***

## **Objective 11: Discuss advantages of performance management**

- Identify performance needs
- Identify performance to project directives

## **Objective 12: 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

## **Objective 13: 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

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## ***Conflict Module***

### **Objective 14: Discuss the positive side of conflict**

- Define conflict
- Analyze eight most common times for conflict
- Identify six reasons for conflict among workers
- Develop rules for handling anger
- Create action plans for quick resolution

### **Objective 15: Analyze hostility and how it surfaces**

- Examine how to handle personal and professional hostility
- Compare levels of group conflict

### **Objective 16: Discuss hedge words people use to distort communication**

- Analyze techniques people use to avoid issues

### **Objective 17: Create a code of conduct for controlling a resolution meeting**

- Compare ways to confront others while helping them save face
- Examine confrontation techniques

## ***Procurement Module***

### **Objective 18: Examine contracting process**

- Discuss methods of contracting

### **Objective 19: Compare contracting types**

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

### **Objective 20: List price and budgeting requirements**

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

## ***Project Management III 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

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## 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
- Update the Cost Model
- Document Assumptions
- Tracking and Monitoring Costs
- Estimate at Completion (EAC) Summary Report
- Financial Metrics

- Resource Loading Updates
- Steering Committee
- Continued on next page
- 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