IAPM

PM GUIDE 2.0

GUIDELINE FOR THE CERTIFICATION OF PROJECT MANAGERS

iapm

INTERNATIONAL ASSOCIATION OF
PROJECT MANAGERS

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In 1997 the IAPM was still a fledgling association. It started out as a loosely structured international network for project managers who shared the objectives of promoting and modernising project management and providing young project managers with the tools to work effectively and successfully. Since this time, the IAPM has held annual International Project Manager Meetings (IPMM). Back in 1998 the IAPM published the precursor to the PM Guide 2.0, the IAPM By-laws of Project Management. These by-laws were completely revised and adapted to modern requirements and real-life project management scenarios in the PM Guide 2.0, which was published in 2010. In the same year, the IAPM was completely relaunched.

In 2012 the IAPM introduced two awards, the Project Manager of the Year Award and the Book of the Year Award.

The Project Manager of the Year Award is very special to the IAPM because it pays tribute to people for their achievements in project management. These people may have been instrumental to the resolution of a crisis situation, they may have successfully implemented a complex development project or they may simply have performed exceptionally in various areas of project management for many years.

The Book of the Year award honours books on the subject of project management that are published in both German and English. These books may communicate experience and knowledge in an innovative way, be (auto)biographical works or textbooks providing an introduction to the subject of project management.

The IAPM is an independent certification body which examines the knowledge and competence of the certification candidates with a comprehensive, fair and neutral online examination system. The certification system is therefore tailored to the challenging world of project management in the 21st century.

CONTENT

PREFACE
ABOUT PM GUIDE 2.0

As project manager, you take advantage of all available opportunities to plan and implement projects, to review progress and to draw conclusions on how to do things better in the next project. Why do you have to document everything you do? Because you know how important it is for future projects. Project managers always try to improve on the things they disliked about their former managers or their behaviour. Yet despite being the probably most important manager in the organisation, project managers often lack orientation. They need rules and proven systems to help them in their work.

We have come to the conclusion that project managers need a comprehensive range of project management tools to help them perform what is the most complex management task of all.
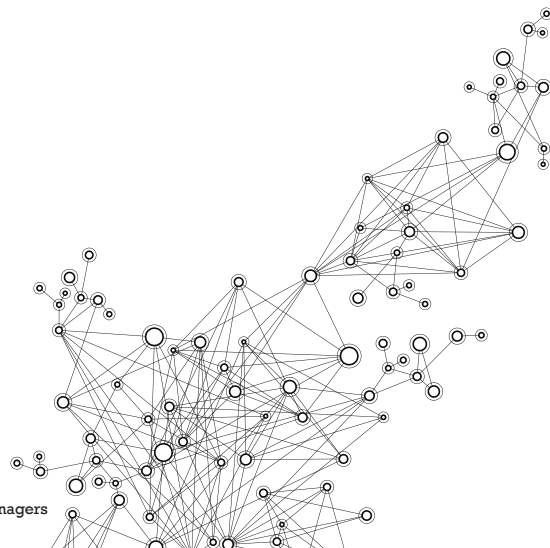
THE THREE SECTIONS OF THE PM GUIDE 2.0

These guideline will help you to make targeted use of your project management knowledge.
It is divided into three sections:

SECTION 1: THE PROJECT

How to initiate a project and bring it to a successful conclusion.

SECTION 2: PEOPLE IN THE PROJECT

How to take the soft factors in project work into account.

SECTION 3: CERTIFICATION GUIDE

How to obtain certification of your PM competence and enhance your market value.

We hope you'll be a first-rate project manager, enjoy team-based project work and maximise your personal success.

Liechtenstein, March 2013

IAPM
International Association of Project Managers ™

SECTION 1 THE PROJECT

PROJECT MAP

1. Project check
2. Project file
3. Project environment
4. Stakeholders
5. Project charter
6. Steering committee and core team
7. Communication meetings, workshops, presentations
8. Creation of the specification
9. Creation of the phase model
10. Creation of the WBS
11. Work package
12. Cost breakdown/budget
13. Process / time schedule
14. Risk analysis
15. PPM and WPR
16. Functional, matrix, autonomous
17. Project start-up
18. Project review
19. Project close out

PROJECT CHECK

You've been assigned to a new task and you want to approach it professionally. **Obviously, the first question you ask yourself is whether it's a project.**

7 Defined start and finish?

1 Objective definition before work commences?

6 Novel undertaking?

2 Limited resources?

5 Complex undertaking?

3 Is interdisciplinary cooperation necessary?

4 Defined responsibilities for results?

If the answer to every question is yes,
it can be assumed that the new task is a project.

If the answers to some of the questions is no,
that's not a problem because some aspects of the task can be supported by project management methods.

If most answers were no,
it's not a problem either, because the task can then be planned as a routine operation.

Write down your own thoughts and the things that have already been said about the following issues.

Is it necessary to define an objective before work commences?

What will the project deliverable be? How long do you need to deliver it? Are their any time constraints? How much will it cost? Are there any financial constraints?

Are resources limited?

Which human resources, machines, equipment etc. can you only use to a limited extent in the project? When will you need these resources? What do you have to expend in return?

Is it an interdisciplinary project?

What expertise do the project team members need? Which qualifications should they have? Do they come from different departments, divisions, companies, cultures?

Have responsibilities been defined?

Who is the customer? Who is providing the necessary funding? Can some aspects of the project be grouped or delegated in sub-projects or work packages?

Is it a complex project?

Why is the undertaking complex? Are people working on it at different locations? Do they all speak the same language? Do they understand each other? Are there coordination problems, e.g. because different technical terminology is being used?

Is it a novel kind of project?

Can you use knowledge gained in similar projects? Can some of the work processes be derived from routine activities?

Has the start and finish been defined?

When can you start formulating the objectives for a specific project contract? When will you have finished planning the project and setting up the organisational structures? When will the project deliverable be finished? When will you be able to assess how much the project has actually cost? When will you have documented the knowledge gained in the project and made it available to your company?

Now you have to create the project file.

PROJECT FILE

PROJECT FILE
Client/Customer:
Type of Project:
Project:

1: Project Organisation
Environment

1.1 Project manager
1.2 Project team
1.3 Steering Committee
1.4 Client/Customer
1.5 Project Partners

2: Project Definition
Preparation

2.1 Tender documentation
2.2 Quotation
2.3 Objectives (performance, Costs, time)
2.4 As-is Analysis
2.5 Contract, order, terms & conditions of business
2.6 Specifications
2.7 Project report (outline, draft)

3: Project Planning
Initialisation

3.1 Phase plan, milestone plan
3.2 Work break down structure
3.3 Network diagram
3.4 List of activities
3.5 Preliminary costing
3.6 Risk analysis
3.7 Project report, Version 0 (int., ext.)

4: Project Controlling
Execution

4.1 Activities List (updated)
4.2 WPD (approved, in progress, completed)
4.3 Project Reports (updated)
4.4 Work Reports, Activity Reports
4.5 Calculations (updated)

5: Project Close-out
Valuation

5.1 Invoicing
5.2 Quality assurance (acceptance)
5.3 Historical cost calculation
5.4 Product generation (routine process)
5.5 Client/Customer evaluation
5.6 Overall knowledge gained

6: Project Material
Collection

6.1 Concepts
6.2 Software (CDs, USBs)
6.3 Accompanying material (scientific materials, articles, literature, reference to other projects, online research, sources)
6.4 Presentations (transparencies, hand-outs)

PROJECT ENVIRONMENT

Projects aren't implemented in a vacuum.

They are implemented within legal/contractual frameworks and subject to constraints on human/technical resources etc. The timely identification of important issues so that they can be taken into account enables the project manager to ensure the project's success. What kind of an environment is your project being implemented in? What do you have to pay attention to in the following areas?

Political - political framework

Which „powerhouses" do you have to take into consideration? Are there conflicts of interests?

Economic - economic framework

Are there economic constraints? Important economic interests? Competitors? Do seasonal or cyclical fluctuations have to be taken into account?

Sociology - sociological framework

Is the project subject to ethical or moral constraints? Do you have to take the sentiments or emotions of people affected by the project into account?

Technology - technological framework

Do technical innovations have to be integrated in the project? Are the technologies tried and tested? Do you have to consider trade mark rights or licenses?

Legal - legal framework

What is the legal framework? Which laws and regulations apply to your project?

Environment - ecological framework

Will your project pollute the environment? Do you have to consider environmental regulations or restrictions?

Do you need professional assistance in any of these areas? How can you deal with constraints? Are there aspects that make it impossible to implement your project? If so, how can you verify the problems and how can you terminate the project?

The prompt termination of a project that is impossible to implement makes sense!
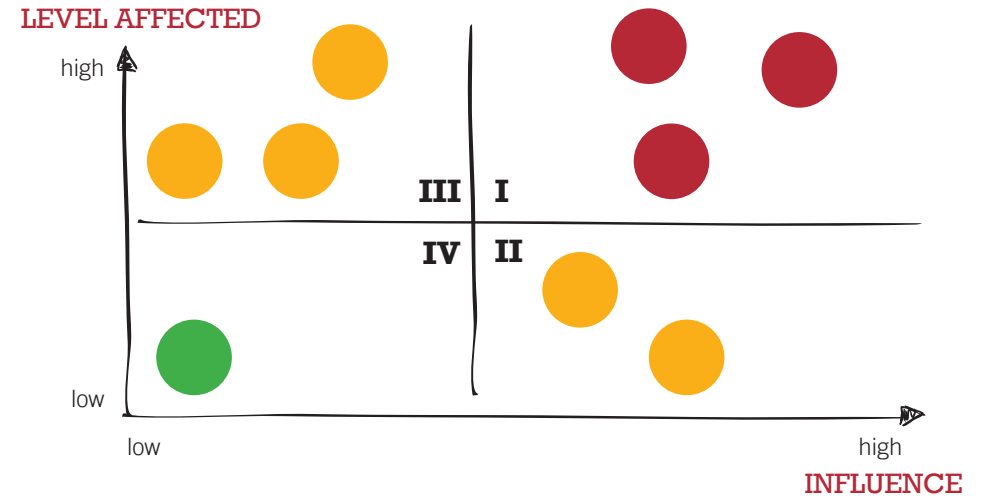
PROJECT STAKEHOLDERS

Projects are made by people for people!

Who will be affected by or able to influence your project and/or the project deliverable? What can you do to get these people involved in the project? What organisational aspects do you have to consider?

Put the people or groups of people in a portfolio.

The two axes of the portfolio represent level affected and influence.

WHICH MEASURES HAVE TO BE DEFINED?

You define the measures for the organisation of/ communications to the stakeholders.

Quadrant I: Get them closely involved in the project (e.g. as core project team members).

Quadrant II: It may be a good idea to make a person a member of the steering committee or project team.

Quadrant III: It may be a good idea to make a person a member of an consultant panel or advisory board. Whatever their role in the project, the people in these quadrants have to be regularly and proactively involved in the communication process.

Quadrant IV: It is often sufficient to provide summarised information on a situational basis.

PROJECT CHARTER

The targets that you have identified up to now help you to draft a project charter with the most significant people in the project. It should include the following points:

Project performance objective

What do you have to achieve by the end of the project?

Project time objective

When will the project start and when will the performance objective be achieved? Have you remembered to allow for float time?

Project cost objective

How much money will have been spent by the end of the project? Does that include contingency funds?

Prioritising objectives

Which objective has priority A: quality, time or cost compliance?
Which things have subordinate priority?

Project cost centre

If the project is an internal one, a project cost centre is set up as the basis for reliable cost management (cost budgeting, cost monitoring).

Project release

Now, the customer can release the project, which means that you are able to plan, implement and finalise it.

The project charter specifies the project manager's role in the project and in the steering committee. Both the project manager and the customer are members of the steering committee. The steering committee should have as few members as possible and meet on a regular basis.

If there is need to make any changes, they will be directly reflected in the quality, time and cost objectives and the consequences of any changes will be evident.

PROJECT ORGANISATION 1
STEERING COMMITTEE AND CORE TEAM

The project may be implemented in an existing company or (though this is unusual) in a temporary company with its own legal status (e.g. Ltd.). The project manager has to consider whether this might be the case.

Set up the steering committee

Initial ideas on the steering committee should be discussed with the customer. From this time on, regular meetings with the customer have to be held. In order to make this possible, a formal steering committee which has both the customer and the project manager as members is set up. Now it is clear that your customer has to be a person with authority, i.e. he has to be able to allocate budget funds, intervene in the company's existing organisational structures and make strategic decisions!

If the customer is not able to do these things, he cannot commission the project and you cannot take a project of this scale on under these circumstances.

Adaptation of project scope or organisation

You either then have to reduce the scope of the project in order that it can be commissioned or leave the scope as it is and look for another customer who is higher up in the organisation's hierarchy.

Core team

Based on the PESTLE and stakeholder analyses which have already been conducted, the project manager considers the functions and departments which will be required in the project. People in departments which can exert the strongest influence on the success of the project are appointed as members of the core team (PM team). To do this, the project manager provides the customer with a list of the necessary functions and skills profiles. The customer then has to liase with the department managers and arrange for the necessary employees to be released from regular duties to work on the project.

WORKSHOP PROCEDURE

Project work is always team work. It involves people with different professional backgrounds and experience (competences) working together. Sometimes, team members have different cultural backgrounds, speak different languages, hold different values and have different basic outlooks on life. In order to overcome these obstacles, the project manager has to be able to implement effective workshops!

Effective workshops – environment and technology

Ensure that a suitable room is selected and that the room contains the right technical equipment (flip chart, pin board, presentation materials, computer projector, overhead projector, transparencies and projector pens).

Effective workshops – implementation

Good visualisation is essential in a good workshop, i.e. the following steps have to be written on a flip chart or overhead projector transparency. This ensures that the team is involved.

Effective workshops – follow-up

Prepare a report detailing the workshop results. Use photo reports because they have a high recognition value and are easy to distribute.

Workshop: Implementation

- **Objectice:** Focus on the issues to be dealt with at the workshop. If a work breakdown structure is being created, the question to ask is „What do we have to do to solve the problem?" (Please refer to the specific workshop instructions).
- **Procedure:** Plan the workshop agenda or procedures.
- **Roles:** Define roles (these are generally time manager, minute taker, team leader and presenter).
- **Duration:** Estimate the duration of each procedure.
- **Dates:** Define the timeframe for each procedure.
- **Implement:** Implement the workshop as planned.

LIST OF TOPICS FOR PROJECT WORKSHOPS

In every project, some aspects of project work are more effectively performed as a team than individually. Sometimes, it may be necessary to gain a quick overview of a situation or obtain the opinions of many different experts, and one-to-one interviews with these people would obviously be associated with time and communication constraints.

The following aspects of project work are best dealt with at workshops.

Suitable workshop topics

Environmental analysis
Stakeholder analysis
Definition of objectives
Phase model
Work breakdown structure
Risk analysis
Basic principles of team work

The following either require a high level of concentration or involve powerful emotions. That's why it is easier to process them individually or in small groups and then to present the results to the team and discuss them in more detail.

Not entirely suitable workshop topics

Contract drafting
Customer specification drafting
Work package definition
Process schedule creation
Cost schedule creation
Capacity and resource schedule creation
Conflict resolving

OBJECTIVE DEFINITION

Sometimes, when you are briefed on a project, ideas may have already been outlined, and a requirements analysis, status quo report or project contract may already exist. Often, project managers don't have to start their projects from scratch because they have access to relatively well-structured basic materials. As project manager, you can either read through these materials to familiarise yourself with them or, better, organise a workshop. After consulting the customer, invites potential core team members to attend your workshop. In large-scale or extensive projects, it is important for the customer to send out the workshop invitations.

1. Project objectives

Date of objective definition, participants.

2. Workshop procedure

Write down the quality, cost and time objectives on the basis of the contract or the customer's briefing
Individual work 10 min

Summarise quality, cost and time objectives, prioritise objectives and clarify differences of opinion or perception
Team work 15 min

Are the objectives realistic? If not, why not? What do you suggest?
Team work 10 min

Have conflicting objectives been avoided? If not, why not? What do you have to bear in mind?
Team work 10 min

3. Workshop follow-up

Now you have to speak to the customer about the defined objectives. Clarify whether the objectives are realistic. If they are, the customer can formally appoint you as project manager, give you the appropriate authority to implement the next steps in the project and assign any necessary resources to you.

CREATION OF A SPECIFICATION

You and the core team define the work and services to be performed, specify the main prerequisites to be met and identify all the things which have to be taken into consideration. You prepare a performance spcification. Sometimes, if the organisation has a quality management system, the performance specification will have a standardised format. If there is no standard format, the following structure can be used. All it takes is a little imagination and adaptation and you have the basis for a summarisation of all expectations and requirements.

STRUCTURE OF A SPECIFICATION

General information
1.1 Scope of application
1.2 Documents and rules to be used
1.3 Description of the object (project deliverable)
1.4 Change procedure (form)

Quality
2.1 Functional quality
2.2 Operational quality
2.3 Constructive requirements

Environment
3.1 Climatic burdens
3.2 Mechanical burdens
3.3 Other environmental burdens

Interfaces
4.1 Overview
4.2 Descriptions

**Testing and quality assurance**
5.1 Test types
5.2 Test schedules
5.3 Licensing documents
5.4 Test synopsis

If it isn't possible to provide any information with regard to any of the above items, the names of team members and „to be defined" are written under the item in question. This indicates that the specification will be supplemented at this point. It also indicates where assumptions have been made.

CREATION OF A PHASE MODEL AS A TEAM
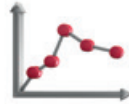
Now the project budget and timeframe have to be planned.
A simple yet effective means of doing this is to create a phase plan.

Project phase plan

Date of phase plan creation, participants.

Workshop procedure

Definition of phases and the results in each phase. A standard phase model is useful here
Team work 15 min

Estimate of the duration and costs of each phase
Individual work 5 min

Preparation of a summary of results, tables and a chart
Team work 20 min

Workshop planning results

A table and the appertaining chart are shown on the next page.

PROJECT START-UP AND PROJECT PLANNING		
Phase breakdown for investment projects	Phase breakdown for organisational projects	Phase breakdown for product development
Engineering ▼	As-is analysis ▼	Market and principal component analysis ▼
Official procedures ▼	Definition of objectives ▼	Feasibility study ▼
Procurement ▼	Target concept ▼	Product development ▼
Construction and installation ▼	Pilot test ▼	Product testing and approval ▼
Start-up ▼	Evaluation of pilot test ▼	Pilot series ▼
Training and documentation ▼	Implementation of the overall concept ▼	Planning and market launch
Planning of practical use	Training	
PROJECT EVALUATION AND PROJECT CLOSE-OUT		

Map: Standard phase model

Table

Phase	Phase results	Duration	Costs

Chart

This cost/time chart can be used to assess project progress and as the basis for control measures.

COSTS (€)

Phase1 Result — P2 Res. — P3 Res. — P4 Res. — P5 Res. — TIME (MONTHS)

KNOWLEDGE GAINED AND FURTHER PROCEDURES

Targets

Unless the phases are precisely specified and the phase outcome is properly defined, it will be difficult to estimate costs and timeframes.

Budgeting model

Before an estimate is made, it is necessary to decide whether to use the top-down or bottom-up method.

Limitations of the phase model

Lengthy, overlapping and/or cost-intensive phases generally cannot be implemented without a work breakdown structure.

CREATION OF A WBS AS A TEAM

In some projects it is necessary to plan work packages (WP) based on the work breakdown structure (WBS).

Indications that it is necessary to create a WBS and define WPs are:

- overlapping, cost or time-intensive phases in the project
- concerns that it may not be possible to implement the project
- expected, possibly substantial risks.

Creation of the WBS as a team

Date of WBS creation, participants (if possible, involve staff who can contribute knowledge and experience i.e. competence from their specialist field).

Workshop procedure

The question for this workshop is „What do we have to do to solve the problem?" Remember that the answers to the question do not initially provide any information about expected costs or time required. This information is obtained on the basis of the defined work packages, which will be dealt with later on.

Every team member writes down the answers, ensuring that they don't just write keywords, but phrases (wrong: "list", right: „create list"). This is a classic creativity technique called brainwriting. The first step of the process can also be supported by mind mapping or similar methods. All answers are then written on MetaPlan cards.
Individual work : 20 min

A moderator is nominated. He or she has to compile the individual team members' answers into clusters and define headings for each cluster. When all the topics have been clustered, another check is made to see whether any more headings or tasks will be necessary to ensure completeness.
Moderated team work: 25 min

In particularly critical projects, it can be helpful to create WBSs with different emphases (phase, function or object-oriented) to close any gaps that may exist.
Moderated team work: 25 min

Workshop follow-up

The work packages are delegated to the team members for precise definition.

WORK PACKAGE SHEET

The WP is similar to a quotation and, like the quotation, it is used to plan, check and evaluate performance. Formulating a WP is not team work. It is a good idea to give this task to the person responsible for the WP. The formulation of the WP is followed by plausibility checks and further consultations.

COST BREAKDOWN STRUCTURE AND BUDGET

The work package costs can be grouped into costs per sub-project and the costs per sub-project can be grouped into project costs.

All cost blocks for staff, raw materials and supplies, power consumption, rents, supplies, external suppliers,
travel and hotel expenses etc. are then covered.

The result provides a clear idea of expected costs.

Now it is necessary to compare the value calculated with

- the cost value calculated in the phase model and
- the cost model in the project objective chart.

Is there float time?

Always ensure that there is float time in a project because project managers who have plenty of leeway and who are not under pressure of time will deliver better results!

If you have problems controlling costs, you can call in the steering committee and clarify the budget issue with the customer (in projects where the main priorities are deadlines and/or quality) or reduce the scope of performance (in projects where the main priority is deadlines and/or costs).

A preliminary budget can then be prepared and used for business planning purposes. Remember that you may have to make changes as a result of process planning or risk assessment.

Procedures when the budget has been fixed

Now it's time to prepare the process and time schedules.

PROCESS AND TIME SCHEDULE

The duration of each work package (WP) and the interdependencies between the WPs are used for **process and time scheduling**.

Step 1

Place the WPs in sequence and link the individual WPs.

Step 2

Has any WP been forgotten? If necessary, define the missing WPs and include them (in the WBS and, after costing, in the cost breakdown structure and process schedule).

Step 3

Include the WP duration in the process schedule.

Step 4

Make forward and backward pass calculations.

Step 5

Calculate free float and determine the critical path.

Step 6

Schedule the WP.

Step 7

Identify any problems and resolve them (e.g. by adapting resources or objectives at deadline and/or quality level).

Procedures after preparing the process and time schedules

Now it's time to prepare the risk analysis.

RISK ANALYSIS

Projects are always future-oriented, which means they are subject to unforeseeable problems or risks. On the one hand, It is practically impossible to implement a risk analysis. On the other, it would be misguided not to. The project team analyses the project risks together in a workshop organised by the project manager.

Project risk analysis...

Date of risk analysis, participants.

Workshop procedure

Identify the work packages which are exposed to risks (RWP) in the work breakdown structure (WBS)
Individual work: 15 min

List the RWPs with reasons
Team work: 15 min

Estimate probability of occurrence [%] and impact [€]
Individual work: 5 min

Work out averages and prepare tables and charts
Team work: 20 min

Define measures for the highest risk WP
Individual work: 15 min

Evaluate measures and include them in the WBS
Team work: 20 min

Post-workshop planning procedures

Adapt the WBS, the WPs, the process/time schedule, the cost and resource plan. Implement change management if necessary.

This kind of risk analysis is dependent on the team having an expert understanding and knowledge of the project. That's why it's a good idea to wait with the risk workshop until the WBS and process schedule have been prepared.

During the project implementation phase, the risk analysis should always be implemented after a critical project review at each phase transition. This ensures that the risk analysis can be used as a project managment tool.

Table

Risk work package (RWP)	Probability of occurrence [%]	Impact [€]	Risk value[€]

Chart

*Highest risk value: probability of occurrence [%] *impact [€]*

PROBABILITY OF OCCURRENCE [%]

IMPACT [€]
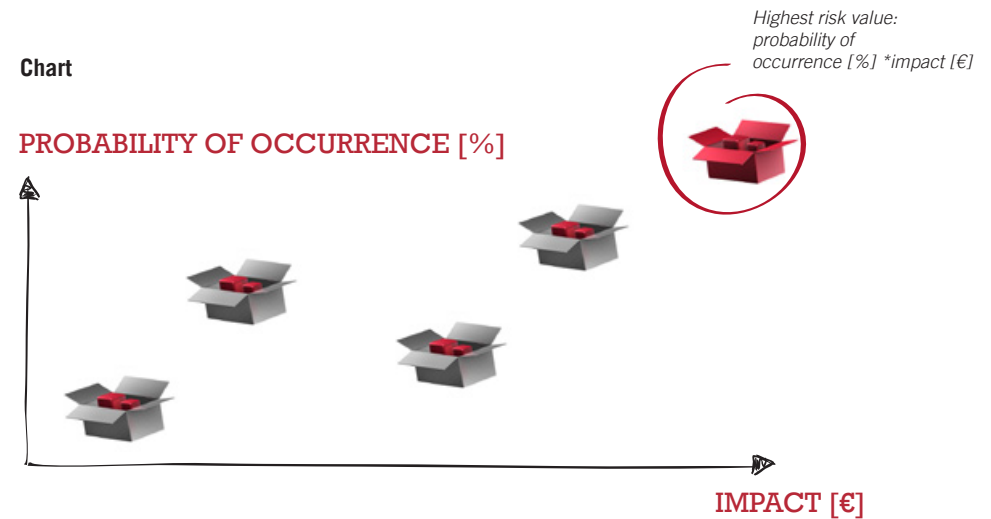
	Measures	Assessment	Selection
1.	...	...	...
2.	...	...	...
3.	...	...	...

PROJECT ORGANISATION 2

SUB-PROJECT MANAGERS AND PEOPLE RESPONSIBLE FOR WPS

Projects are teamwork undertakings. In order to organise this team work, the project manager has to define work packages. He can take them from the WBS. But who is the project manager's partner in the project?

Step 1

Decide which functional unit in the organisation or which external partner could perform the WP. Include the unit or external company in the WBS and create the first organisation breakdown structure (OBS), assign sub-project managers and the people who will be responsible for the work packages.

Step 2

It will be necessary to prepare a skills profile for some WPs so that the WP responsibilities can be defined. It may be possible to gain the customer, the personnel department and/or (subject to the customer's consent) a line manager as supporters in this task. If the organisation implementing the project has a quality management system, e.g. based on ISO 9000, there may be pre-defined employee profiles in the QA manual.

Step 3

Define the people responsible for the WPs; possibly in conjunction with the people specified in step 3.

Step 4

It may be necessary to discuss the WPs with the person who is responsible for it and make some adjustments.

Step 5

Create a project organisation chart and an establish an escalation procedure in case of a crisis. Clarify whether you, the project manager, have decision authority in the event of a crisis. Why? Because you have the most extensive knowledge of the project.

Procedures after defining the people responsible for WPs and sub-project managers

The project is now integrated in the line organisation.

PROJECT ORGANISATION 3

LINE, MATRIX, AUTONOMOUS

The project now has to be integrated in the organisation implementing it and the project manager has to be furnished with formal authorities.

Step 1

Define a suitable organisation (line, matrix or autonomous) and substantiate the choice.

Step 2 - line organisation

Make it clear that the customer is the sole project decision maker in the line organisation. All you do is update the plans and point out any deviations!

Step 2 - matrix organisation

You are responsible for the timely completion of the WPs. The issues of work quality, responsibility for implementation and all personnel management issues, i.e. leave scheduling, staff appraisals etc. are dealt with by the line manager!

Step 2 - autonomous organisation

You have sole responsibility for all aspects of project work. The project team members report directly to you and you represent the project both within the organisation and externally. You need the necessary formal authority to do this, i.e. authority to act or general power of attorney as managing director.

Step 3

Decide who will be the deputy project manager (in case you want to take holiday leave or are off work sick). Loyalty is a more important criterion than professional competence when choosing a deputy project manager! Is it necessary or would it be helpful to establish an advisory board? If so, then define the members and their competences. Also define when and how often meetings and project reviews will take place with the customer and sub-project managers.
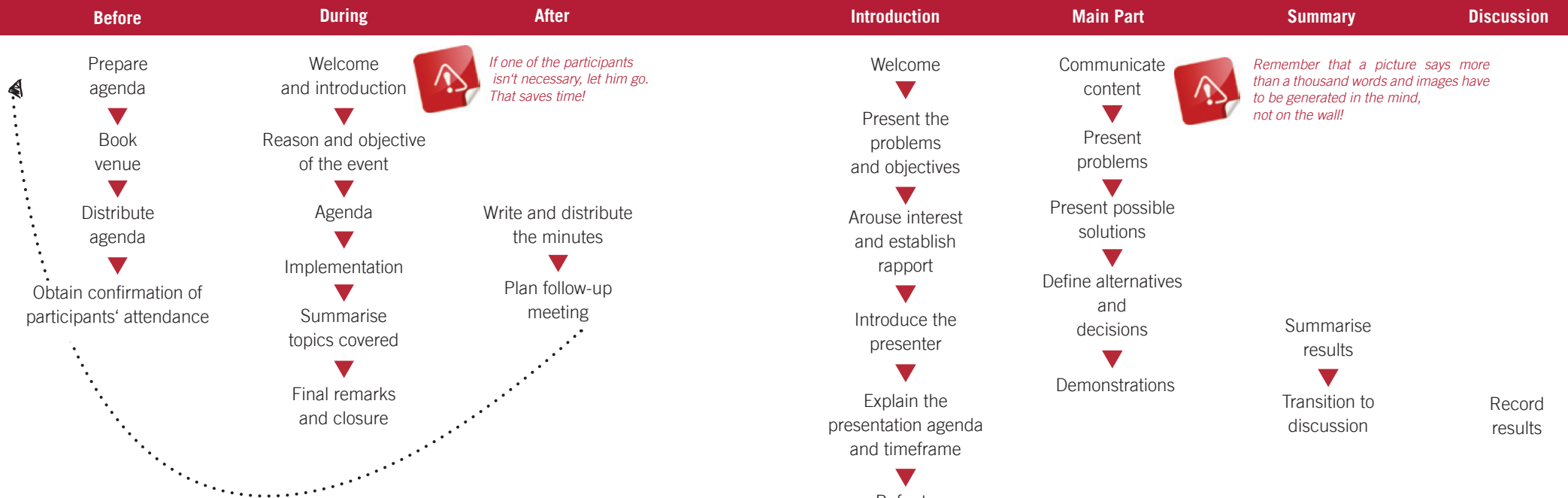
Procedures after the establishment of the project organisation

As project manager, it is best if you are given executive management competences by the customer. This enables you to formally commence project implementation. You have to remain on the project path and, communicate regularly!

MEETINGS AND WORKSHOPS

Before	During	After
Prepare agenda	Welcome and introduction	
▼	▼	*If one of the participants isn't necessary, let him go. That saves time!*
Book venue	Reason and objective of the event	
▼	▼	
Distribute agenda	Agenda	Write and distribute the minutes
▼	▼	▼
Obtain confirmation of participants' attendance	Implementation	Plan follow-up meeting
	▼	
	Summarise topics covered	
	▼	
	Final remarks and closure	

Minutes	
Project	Date
Subject	Start
	Venue
Chairperson	
Minute taker	
Persons attending	
Signatures of persons who have read the minutes	
Absentees	
Distribution list	
Agenda	

Writing the minutes of the meeting is your first duty as project manager.

Use open-ended questions at your meetings (e.g. why, what for …).

PRESENTATION

Introduction	Main Part	Summary	Discussion
Welcome	Communicate content		
▼	▼	*Remember that a picture says more than a thousand words and images have to be generated in the mind, not on the wall!*	
Present the problems and objectives	Present problems		
▼	▼		
Arouse interest and establish rapport	Present possible solutions		
▼	▼		
Introduce the presenter	Define alternatives and decisions	Summarise results	
	▼	▼	
Explain the presentation agenda and timeframe	Demonstrations	Transition to discussion	Record results
▼			
Refer to documents			

As project manager, you are responsible for ensuring that your own or sub-project managers' presentations have structured content and are interesting.

Be demanding on your presenters!
How?

Ask for eloquently presented an interesting presentations and you'll always be amazed by the results!

PROJECT REVIEW

Your project is in the implementation phase, but are you still in control or losing the thread? To find out, you have to implement regular project reviews.

For example, you can implement reviews at phase transitions.

Ask yourself and your team (sub-PM, person responsible for WP):

- What is the project's current status in terms of quality, deadline and cost objective achievement?
- What did we want to achieve, what have we achieved?
- What problems were encountered?
- Why?
- Are the project requirements being met?
- What do I have to do to bring the project back into line when deviations occur?
- Do the objectives have to be revised?
- Can float time be used?

The review covers both technical and emotional aspects of the project and you can use the review findings to forward plan and manage risks. Risk management is a valuable asset to you throughout the project and it helps you to keep in touch with your project!

Incorporate any agreements that are made in your planning activities.

Procedures after the project review

As project manager, you present the review findings to the customer. Take your deputy project manager along to these meetings with you.

PROJECT CLOSE-OUT, PROJECT EVALUATION

Every project has to be formally concluded.

You have to

- get customer approval of work or services performed
- calculate the cost of the project and wind up commercial controlling
- document knowledge for the next project and
- if your project has autonomous management structures, you have to officially dissolve the project team and relinquish your authority.

Call your project team together for one last meeting and thank them for their hard work. Combine this meeting with a final meal or party together (on a suitable scale for the size and significance of the project).

Ask the members of your team what things they would leave unchanged and what things they would do differently in future.

Procedures after the project review

You can use the knowledge that you have gained in your project for the next project. Ensure that any procedural instructions, templates and documents are adapted.

If you think you have implemented a genuinely good project, put yourself and your team forward for a Project Excellence Award.

SECTION 2 PEOPLE IN PROJECTS

PROJECT MANAGER MAP

1 Team building

8 Stress management

2 Leadership

7 Personal success

3 Motivation

6 Time management

5 Conflict management

4 Working in the project team

TEAM BUILDING

A project manager can't manage a project alone. He has to include people with a range of different qualifications and experience on the team and ensure that they are suitably motivated.

Step 1 – Forming

Form your team. The stakeholder analysis shows you which departments and individuals have to be involved in the project. First of all, talk to your customer about the people who you intend to include in your team. Then form your core team.

Step 2 – Storming

Get the creative chaos under control as quickly as you can. You can do this in an official team building workshop where all aspects of project planning can be discussed. Never omit the informal part. Allow project team members to satisfy their „social needs" (getting to know each other, team development, appreciation of their work etc.).

Step 3 – Norming

You have to help your staff to quickly fuse as a team! Give your team a project identity by defining a vision, motto, slogan and logo for the project. That breathes life into the project and motivates the team.

Step 4 – Performing

After steps one to three, the project team members are capable of targeted project planning. Do remember, though, that some of your project team members will leave the team at phase transitions and it may be necessary for new people to join the project. Remember to thank team members who leave the project and help new project team members to integrate themselves in the project. It may be necessary to arrange another brainstorming session.

Step 5 – Adjourning (in autonomous project organisations)

Some project team members will seek new challenges before the project is officially closed out. Others will attempt to re-open work packages that have long been closed out in order to continue working on the project. You have to be prepared for project team dissolution and be aware of the best way to dissolve your team.

Memory hook

For (Forming)
Super (Storming)
New (Norming)
Projects (Performing)

LEADERSHIP

The project objective has to be clearly defined. You can only guide your project team in achieving the project objectives if you know what the objectives are.

Are the objectives clearly defined or is further clarification necessary? Go to objective definition checklist if necessary.

As project manager, you have to guide your team and your suppliers.

Can you do that? Have you got their confidence and the necessary competence? Go to project organisation and/or team building checklist if necessary.

You have to explain the processes and next steps to the project team.

Is the project environment clearly structured and are planning activities consistent? Go to phase model and/ or process and time schedule checklist if necessary.

People don't want to feel confused.

Are the procedures and decisions comprehensible? Go to workshop procedure checklist if necessary.

Decisions have to be made.

Are you aware of the consequences of your decisions? Are your decisions substantiated? Can you stick by your decisions once you have made them? Go to risk analysis checklist if necessary.

You work in a team with people from different fields who want to prove their competence. Each of them has to be given the opportunity to shine!

Have you given the other people in the project their share of the limelight? Go to team building checklist if necessary.

You are a manager and a leader. Management is all about asking questions. Open-ended questions!

„Why?" is a management question. Did you use it the last time you talked to project team members? Go to meetings and workshops checklist if necessary.

A manager has to set an example, be more resilient and shoulder greater levels of stress as the team members!
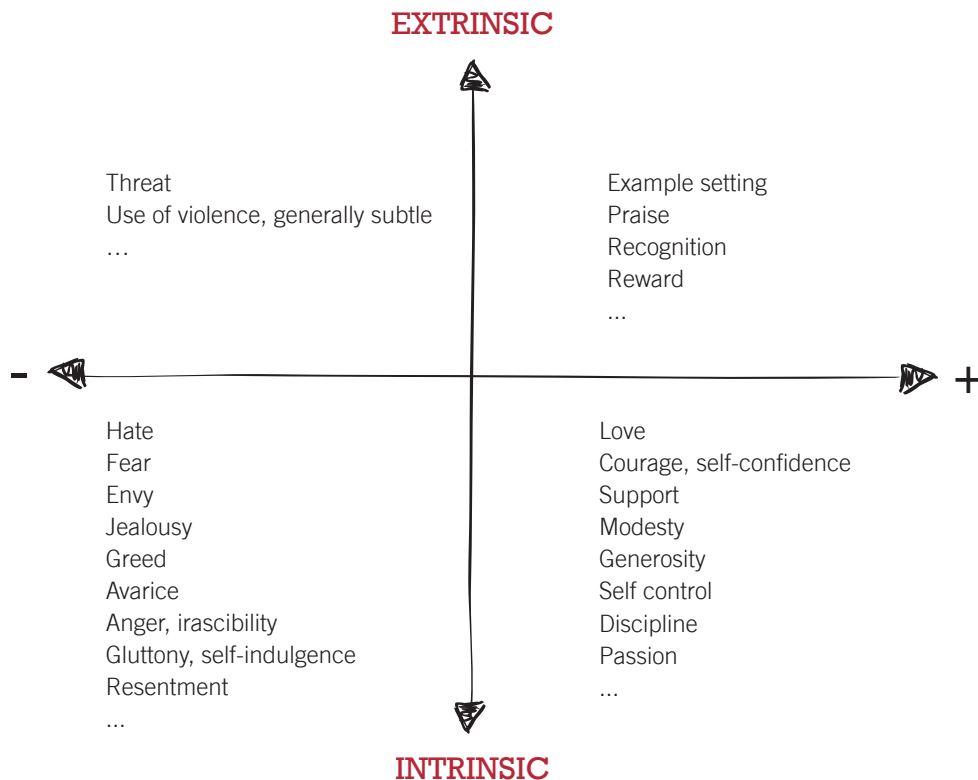
Can you do that?

MOTIVATION

Project team members all have different professional qualifications and different motivations.

In autonomous project organisations, you can use all kinds of motivational incentives. In the matrix and line organisations, your options are limited. For example, in a matrix organisation, the project manager can't use negative motivation (e.g. threats) and a project manager in a line organisation is often not able to provide positive motivation (e.g. rewards).

Use the motivation matrix whenever possible and remember the two basic types of motivation ("towards" and "away from").

EXTRINSIC

Threat
Use of violence, generally subtle
…

Example setting
Praise
Recognition
Reward
…

− ← → **+**

Hate
Fear
Envy
Jealousy
Greed
Avarice
Anger, irascibility
Gluttony, self-indulgence
Resentment
…

Love
Courage, self-confidence
Support
Modesty
Generosity
Self control
Discipline
Passion
…

INTRINSIC

WORKING IN THE PROJECT TEAM

Your project stakeholders want to receive information about the project's status.

You provide regular information to stakeholders by way of

- regular meetings
- milestone meetings
- phase transition meetings
- project reviews
- project closure meetings.

When you provide first-hand information ensure quality of

- telephone calls
- correspondence
- meetings
- presentations.

When you provide second-hand information ensure quality of

- downloads
- websites

In your communications make sure that you talk to people and not about people.

Remember Socrates' sieves of effective communication and always check for

- relevance
- truth
- quality.

You, as project manager, are responsible for all aspects of information transfer and communication. The only exception is information transfer and communication within the line organisation, where you can only provide advice and recommendations.

CONFLICT MANAGEMENT

Konflikte liegen in der Natur der Menschen.

1. Preventing conflicts

The main thing is to prevent conflicts from occurring. How do you do that?

- stakeholder management
- providing information to the right people
- obtaining feedback, e.g. at the end of the meeting/ workshop etc.
- and by implementing project reviews.

Keep your eyes open at all times to identify any latent conflicts! And remember that the conflict may still occur, even if you are watchful.

2. Conflict management: covert conflicts

- Is the conflict out in the open or covert?
- Have you prepared a social network diagram?
- Have you correctly identified the parties to the conflict?
- Have you created profiles of the conflict partners?
- Are the conflict partners included in the organisation chart?

3. Conflict management: open conflicts

- Have you checked where the conflict is in the conflict spiral?
- Have you checked whether you are the right conflict manager for your project organisation form?
- Have you used the 10 point plan for conflict management?
- Have you obtained professional advice (works council, company medical officer, company psychologist, mediator, arbitrator, legal expert, line manager, steering committee etc.)?
- Have you reported, transferred, escalated the conflict to the proper persons or departments?

TIME MANAGEMENT

Clarity about life objectives

You can't manage your time effectively unless you are absolutely clear on your life objectives. You can obtain clarity by way of

- a funeral oration
- a life fairytale and/or
- a toilet map

Write down all your visions about what you want to achieve, create, experience, see, learn and practice in your life.

Your desires

The areas that you identify in this way provide clarity about your mission, strategic orientation, desires and attitudes to life.

Methods of time management

When you have identified the things that are important to you with the measures that you will use to achieve them and the dates by when you want to have achieved them, you can group other tasks around your issues, follow an efficient time management concept and apply the appropriate methods (e.g. time scheduling and deadline monitoring, filing, documentation and archiving systems, creation of a quiet work environment that helps you to concentrate while you work, use of modern communication and information methods etc.)

PERSONAL SUCCESS

You manage your priorities with the help of

- a relevance matrix to ascertain order of urgency and the
- Eisenhower principle, which involves categorisation as „important" and „urgent"

When you have set your priorities, work on your tasks as follows according to their priority:

1. High urgency and high importance

Focus on the task and be consistent, concentrate on what you are doing and don't let people interrupt you.
Use all available information sources and, naturally, the 80/20 rule;

2. High urgency and low importance

Ask other people to provide their competence by delegating and making your supporters successful.

3. Low urgency and high importance

Remember to use your hold file. Often, these tasks cannot be finalised, perhaps because they are routine activities, because you need additional input or because you have more urgent tasks to work on.

4. Low urgency and low importance

Don't work on these tasks, discard them! And if the task's priority should change, it will cross your desk again and you can process it then. So don't hold back on discarding tasks and don't worry about it.

STRESS MANAGEMENT

Stress makes people ill, and it's the last thing you need. Do everything you can to avoid stress - if you have the power to do so!

1. Stress analysis

- Who or what is causing the stress?
- Why am I stressed?
- Has it built up recently or over a long period?

Temporary stress is caused by things such as

- crises
- strokes of fate
- force majeure
- hopelessness

Permanent stress is caused by things such as:

- conflicts
- high workload
- mental overload

2. Measures

Can I do something to combat the stress or do I have to become more resistant to it? Prepare a stress management and stress resistance plan and be very disciplined about sticking to it.

3. Time heals all wounds!

You know that time heals all wounds, so you can handle sudden stress that is outside your sphere of influence.

SECTION 3

CERTIFI-CATION GUIDE

INTRODUCTION
CERT. PROJECT MANAGER (IAPM)

All IAPM certification procedures are based on the IAPM Project Guide version 2.0 (PM Guide-IAPM). The PM Guide is based on the comprehensive IAPM project management knowledge base. A panel of experienced international project managers and scientists collaborated on the development of this knowledge base. It is regularly optimised and updated to bring it into line with international standards and best practices. The IAPM Project Guide is available as a download on the IAPM website (www.iapm.net).

The IAPM certification levels of Certified Project Manager (IAPM) and Certified Senior Project Manager (IAPM) reflect international project management practices and experience.

CERTIFICATION

Certified Senior Project Manager (IAPM)

The candidate must have at least 5 years of experience in project management, three of which in a senior position or a position with major responsibilities. Proof of project management experience and competence in the practical application of project management methods and tools must also be provided.

Certified Project Manager (IAPM)

The candidate must have project management knowledge in all competence elements. Previous experience is not necessary, but it is advantageous.

Certified Project Management Trainer (IAPM)

Holders of the Certified Senior Project Manager (IAPM) certificate who have proven experience in project management training can apply for the Certified Project Management Trainer (IAPM) certification course. An IAPM commission decides whether the applicant satisfies the criteria for the course. The course curriculum covers all the knowledge and competences that a project management trainer requires.

CERTIFICATION   LEVELS   COMPETENCES

Application and examination	→	Cert. Project Manager (IAPM)	Knowledge
Application, references and examination	→	Cert. Senior Project Manager (IAPM)	Experience and knowledge

EXAMINATION, APPLICATION AND ADMISSION PROCEDURE

The application for certification must include the following documents:

Application documents for "Certified Project Manager" certification

- Application form
- Curriculum vitae

Application documents for "Certified Senior Project Manager" certification

- Application form
- Curriculum vitae
- Project management experience
- (List and descriptions of between one and five projects in which the applicant was project manager or held a key management function)

All forms have to be filled in on the IAPM website. Applications by surface mail are not possible. After receipt of the documentation, the IAPM will check the documents for completeness and establish whether the applicant satisfies the admission requirements.

If an application for Certified Senior Project Manager (IAPM) certification is submitted and the documents do not support the application, the candidate will be notified accordingly. The IAPM's decision is final. A new application can be submitted once the applicant has gained additional project management experience which meets the IAPM's requirements. If the candidate does not have the Certified Project Manager (IAPM) certificate, the IAPM will recommend that this certification is applied for.

TESTS

The IAPM provides candidates with three optional examinations to maximise their chances of success:

SELFTEST, INTERIM EXAMINATION AND CERTIFICATION EXAMINATION.

The basic examination and the certification examination can be taken online at the IAPM website from any PC. However the interim examination can only be taken by participants of a course provided by an IAPM licensed trainer or training partner. The trainer will advise you whether it is recommendable to take the interim examination or the certification examination.

Certification examination candidates must be approved by the IAPM. This approval is contingent on the application process. There is no requirement to take a course with an IAPM-licensed trainer or training partner to take the examination. However, participation in a preparatory course is strongly recommended.

SELFTEST

There is a basic examination on the IAPM's website so that candidates can gain an idea of the types and level of difficulty of the questions that may be asked. To take the examination, simply go to www.iapm.net and follow the instructions.

INTERIM EXAMINATION

The interim examination can only be taken by candidates who have registered for training with an IAPMlicensed trainer or training partner. A list of certified training providers is published on the IAPM website.

CERTIFICATION EXAMINATION

Once a candidate has been approved by the IAPM, the examination can be taken without any further requirements on a computer of the candidate's choice. Before the examination, the candidate must fill out and sign an affirmation in lieu of oath that he or she is taking the examination without assistance or aids such as books or computers. The examination questions cover all the IAPM competence elements as set out the PM Guide. They are randomised and taken from a comprehensive catalogue of questions.

PASSING THE EXAMINATION

In order to pass the examination, candidates must answer 65% of the questions correctly. The examination score is calculated automatically straight after the examination and the candidate is notified of the result electronically.

RE-TAKING THE EXAMINATION

Candidates may re-take the examination once at the time of their choice. If they fail the examination a second time, there is a mandatory waiting period of 12 months before the examination can be taken again. If the candidate also fails this second re-take, he or she will be disqualified from taking any further certification examinations. The examination fee is payable in each case.

CERTIFIED PROJECT MANAGEMENT TRAINER (IAPM)

Participation in a course is mandatory for this certification. These courses can only be provided by trainers or training partners who are licensed by the IAPM. Information about IAPM-licensed trainers or training partners can be found on the IAPM website. The courses provide the knowledge and competences which are necessary to obtain the Certified Project Management Trainer (IAPM) certificate. The examination and a detailed assessment are held during the course. No computer-based examination for this certificate is available.

AFFIRMATION IN LIEU OF OATH

1. I agree to satisfy and conduct myself in accordance with all IAPM certification programme policies and requirements.

2. I shall maintain confidentiality of IAPM examination questions and content. Furthermore, I agree not to copy, discuss, debrief or disclose, in any manner, the specific content of IAPM examination questions and answers to any individual.

3. I certify and swear that I have performed the exam entirely alone and without the help of any other individual, literature or any other means of assistance.

4. I agree that I shall at all times act in a truthful and honest manner and provide truthful and accurate information to the IAPM. I agree that any intentional or unintentional failure to provide true, timely and complete responses to questions in this application may lead to further investigation and/or sanctions by the IAPM.

5. I agree that all materials that I submit to the IAPM certification department become the property of the IAPM certification department, and that the IAPM certification department is not required to return any of these materials to me.

6. I agree that information related to my participation in the IAPM certification process may be used in an anonymous manner for research purposes only.

7. I agree that all disputes relating in any way to my application for an IAPM certificate and/or my involvement generally in an IAPM certification program, will be resolved solely and exclusively by means of IAPM certification department policies, procedures and rules. Any disputes or lawsuits are excluded.

8. The IAPM reserves the right to suspend or revoke the certificate of any individual who is determined to have failed to uphold, or otherwise breached this agreement. In this case, the IAPM reserves the right to pursue criminal proceedings.

9. I release and indemnify the IAPM and the IAPM certification department from all liability and claims that may arise out of, or be related to, my project management and related activities.

10. I hereby release, discharge and indemnify the IAPM, its directors, officers, members, examiners, employees, attorneys, representatives, agents and the IAPM certification department from any actions, suits, obligations, damages, claims or demands arising of or in connection with this application, the scores given with respect to the examination or any other action taken by the IAPM with regard to certifying, testing and professional development including, but not limited to, all actions related to ethics matters and cases.

11. I understand and agree that any decision concerning my qualification for any certificate, as well as any decisions regarding my continuing qualification for any certificate rest within the sole and exclusive discretion of the IAPM, and that these decisions are final.

IMPRINT

Iapm
★ INTERNATIONAL ASSOCIATION OF
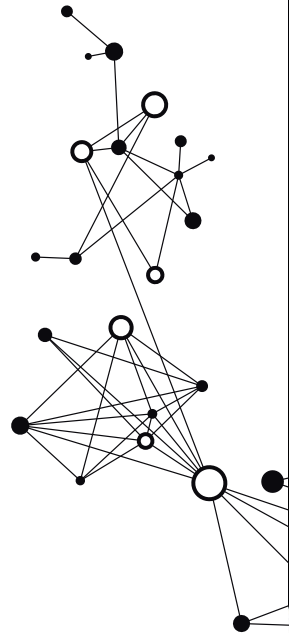PROJECT MANAGERS

THE BENEFITS
HOW YOU CAN BENEFIT FROM IAPM CERTIFICATION

**1 COMPETITIVE ADVANTAGES &
CAREER LAUNCHING PAD**

- Proven project management competence
- Competitive advantages for organisations and individuals
- Standardisation of terms and methods with the PM Guide 2.0
- External, objective verification of knowledge and experience

2 ONLINE EXAMINATIONS

- No travel expenses
- No pressure of time to prepare
- Exams can be taken on any PC

3 NO RE-CERTIFICATION NECESSARY

- No certificate expiry date
- No new costs

4 FAIR FEES

- The fees depend on the GDP of the country in which the certificate candidate has citizenship.

5 ANONYMOUS CERTIFICATION

- No subjective evaluations
- No "fail quota"
- No discrimination