

# Project Management IV

## *Project Execution, Monitoring, and Close Down*

*Course Length – 4 1/2 Days*

*PDU's - 30*

**Course Description:** Participants will focus on monitoring and executing the project while moving into the close down phase of the project. Additional focus will be on problem solving and delivering quality customer service and value, regardless 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 the Project Management Institute's nine knowledge areas of *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.*

### **PHASE IV**

- Describe ways to communicate bad news
- Classify how to manage the project through influence rather than power
- Summarize danger signals to watch
- Assess how to crash a project
- Implement close down checklists and handoff procedures
- Identify phase out of the project
- Conduct a postmortem
- Review current hindrances facing organizations

### **Customer Service Module**

- 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
- Break down top customer complaints
- 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
- Rate human factors which mislead communication
- Understand unspoken signals which distort communication
- Understand how to put active listening to work
- Select 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
- Measure warning signals that customer service is dying
- Identify five ways to improve your customer service in every project

### ***Performance Module***

- Discuss advantages of performance management
- Identify performance needs
- Match performance to project directives
- Analyze ways to communicate performance expectations in every project
- 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
- Explore how to break down project performance into understandable steps
- Define how to map the performance map
- 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
- Establish a project performance development plan to transition team members toward peak performance

### ***Procurement Module***

- Contracting process
- Methods of contracting
- Contracting types
- Evaluating and awarding contracts
- Conducting a search for contract source
- Price and budgeting requirements
- Interpreting changes
- Termination of contracts
- Handling appeals, disagreements in contract
- Contract closeout planning

## ***Project 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