Revisions to Worldwide Standard

Presented to Boston-SPIN

By Marie Gunnerson

Topics

- The Project Management Institute (PMI)
- PMI Standards
- Volunteer Service
- Impact to organizations and practitioners
The Project Management Institute

- PMI Founded in 1969
- Assembled professional PM practices
- Published PMBOK® Guide standard
- Established PMP credential
- World-wide membership
- 250,000 members
- Local chapters

Best of the Professional Association

- Dedicated to advocating for membership and broader project management community through
  - Certification
  - Research and providing information and resources
  - Career and professional development
  - Professional standards
  - Network and community involvement opportunities
- For 37+ years, PMI has advanced the careers of practitioners who make project management indispensable for business results
Strategic Goals

- Superior practice of project management
  - Standard practice in all countries of the world
  - Connected directly to organizational success
- Global acceptance of project management
  - Achieve global recognition for consistent delivery of project management excellence and success
  - Corporate leaders worldwide recognize the significance of project management

PMI Standards

- Developed under ANSI standard
- Developed under the auspices of the PMI standards group
- Developed/written/revised by volunteers
Current PMI Standards

Standards Teams

- Volunteer list
- Expressed interest
- Sought by PMI
- Organized by PM
- Team organized to meet goals
Chapter Team Lead

- Responsible for chapter content
- SME in chapter topic
- Work with volunteer content providers
- Resolve issues with team members
- Collaborate with other team leads

Requirements to Participate

- Confidentiality Agreement
- Conflict of Interest Agreement
- Assign Copyright to PMI
Copyright must be granted PMI

- PMI owns standard
- All contributions become property of PMI
- Authors are granted right of use to the material they contribute
  - with PMI copyright acknowledged
- Copyright needed for review comments
Standards Project is Formed

- PM
- Project Charter
- Team Charter
- Project Scope
- Core Team
- Project Team
- Project Plan

PMBOK® Guide - 4th Edition: High Level Requirements

- The updated standard shall be harmonized with
  - The Standard for Program Management – 2nd Edition
  - The Standard for Portfolio Management – 2nd Edition
  - OPM3® – 2nd Edition
  - The Unified Project Management Lexicon

- Provide information on project management that is clear, complete, relevant, and generally recognized as good practice on most projects most of the time.
Objectives and Goals

- Be easy to read and understand.
- Document the evolution of the profession since the 3rd Edition
- Provide clarification where
  - Currently not reflective of how project managers manage a project,
  - It is unnecessarily complex and confusing
- Consolidate processes

Project Charter

- Issued by PMI
- Approved by:
  - PMI Standards group
  - *PMBOK® Guide* Project Manager
- Accepted by project team
Project Charter Consists of

- Purpose of charter
- Project
- Business Need
- Product Description
- Scope
- Administration

Team Charter

- Team Values
- Guiding Principals
- Conflict Management
Team Values

- Trust
- Collaboration
- Openness
- Respectfulness
- Adaptability
- Professionalism
- Schedule-driven

Guiding Principals

- Serious work, but have fun
- Generosity of Spirit
- Respect Volunteers Time
- Walk the talk
- Succinct and Clear
- Assume Positive Intent
- Open Communication
- Chalice Management
Conflict Management

- PM seeks team members’ feedback
- Team will have opportunity to support issue, but not vote
- Final determination by PM
- Escalation to Standards Manager if needed


1. Project Objectives
2. Product Scope Descriptions
3. Project Team Requirements
4. Project Boundaries
5. Project Interim Deliverables
6. Product Acceptance Criteria
7. Project Assumptions
8. Project Constraints
9. Initial Project Organization
10. Initial Project Risks and Opportunities
11. Schedule Milestones
12. Project Configuration Management Requirements
Core Team

- Guides development of standard
- Chairs committees
- Adjudicates comments

Project Team

- Volunteers indicate area of interest
- Strive for global participation
- Diverse backgrounds
- Seek SMEs
Challenges

- Interest may not equal expertise
- People volunteer, people willing to work: harder to find
- Some may bring self-interest
- Ying: Diversity adds perspective
- Yang: Path to parochialism

Chapter Development Process

- Review previous standard
- Deferred comments
- Determine whether changes are needed
- Depending on nature of change request to Change Control Board (CCB) required
- Develop draft content for review
- Release for comment
Updating Content

Chapter Lead
- Review defined connections from 2nd Edition and map to 3rd Edition
- Coordinate with PM on any questions

Content Contributors
- Lead team in conversations and collaborate on conversations
- Review current content
- Lead team in content

Content Reviewers
- Validate content
- Submit revisions
- Create chapter draft
- Review content
- To page 2

Editor, Quality, Integrator
- Manage timelines, provide support and report status to PM

Updating Content 2

Chapter Lead
- Maintain content process
- Approve content
- Create per-baseline version of integration reviews
- Approval to baseline

Content Contributors
- Update content based on revisions
- Review and submit for baseline per various publishers

CM
- CM baselines in the CM library

Editor, Integrator, Quality
- Manage timelines, provide support and report status to PM
Summary Project Schedule

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<th>Task Name</th>
<th>Duration</th>
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<th>Start</th>
<th>Finish</th>
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Current Status

- **PMBOK® Guide – Fourth Edition** going to exposure draft
- December 12, 2007 at [www.pmi.org](http://www.pmi.org)
- All interested parties may review and comment
- Do not need to be member of PMI
- Part of ANSI requirements
Consistent alignment among related PMI standards in addition to and including:

“Any necessary work to make the standard more accurate, up to date, relevant, clear, concise and easy to understand and implement.

This may include the re-organization of content, additional content, refinement of content, or deletion of content.”
**PMBOK® Guide — Fourth Edition**

**Consistency**
- All process names are now Verb-Noun format
- Each process has a data flow diagram
- The inputs and outputs are standardized for consistency

**Clarification**
- Added Stakeholder Identification process in Project Communication Management. This is an Initiating Process
- Added Collect Requirements process in the Project Scope Management. This is a Planning Process
- Combine 6 procurement processes into 4
- Deleted Develop Preliminary Scope Statement
- Deleted Plan Scope
**PMBOK® Guide — Fourth Edition**

Core Project Team still active
- CCB
- Glossary
- Documentation and lessons learned
- Most volunteers released pending Exposure Draft

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**New standard**

- New material for exam
- New, updated PMP, CAPM exams
- Impact on other standards
- Companies base their processes on PMI
- Time to adjust to new standard
- Opportunities for consultants
New Standard  (Continued)

- Organizations that are obligated to meet PMI’s standard must adopt
- Impact to life cycles based on PMI Standard

Lessons Learned

- Team dynamics plays role
- Not all changes possible
- Some things must be deferred
- Copyright – your work isn’t your own
- Time – global team work hours
- Valuable and worthwhile work!
In Grateful Recognition of The Contributions of Time &
Effort Devoted to the Successful Foundation of the
PMBOK® Guide—Fourth Edition
Chapter 6
This Certificate is Presented to:
Ms. Marie Gunnerson
a.k.a. Professional in the face of
adversity and strife
Making project management indispensable for business results.

PMI Mass Bay Chapter
Boston Area Chapter of PMI
Drawing for PMI Practice Standard for Scheduling
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