

Project Integration and Scope Management

Presenter: Tony Keith, PMP
Vice President, Project Manager
Compass Bank

Purpose of the Class

- Review and provide practical application of the project integration and scope management principles outlined in the Project Management Body of Knowledge (PMBOK).
- Open dialogue between presenter and participants on experience gained in projects at different organizations.

Slide 2

C2 Change title to "Purpose of the Presentation", since this is a meeting presentation rather than a class.

Colonial, 4/26/2004

Areas Covered:

- Project Integration Management.
- Project Scope Management.

Project Integration Management

- PMBOK defines Project Integration Management as including those processes required to ensure that the various elements of the project are properly coordinated, and lists the following processes as **PRIMARILY** integrative:
 - Project Plan Development.
 - Project Plan Execution.
 - Integrated Change Control.
- A key point is that the project integration management involves making trade-offs among competing objectives to meet or exceed stakeholder needs and expectations.

Project Integration Management (cont.)

- Project Plan Development – uses the output of the project planning process to create a document that can be used to guide both project execution and control.
 - Compass – the outputs from our project planning process usually include:
 - Project Business Requirements.
 - Project Business Case and Capital Expenditure Request.
 - Project Cost and Time Estimates.
 - Project Scope Document.
 - Project ROI (or “Payback Period”).
 - Vendor Project Plan – usually our starting point.
 - Your experience?

Project Integration Management (cont.)

- Project Plan Development (cont.)
 - Compass – once we have an approved CER, we typically will build a “draft” project plan that can be reviewed in the Project Kickoff Meeting.
 - The starting point for this plan is usually a vendor project plan.
 - Input is taken from the entire project team and incorporated into the plan.
 - Your experience?

Project Integration Management (cont.)

■ Project Plan Execution

- Project plan execution is the primary process for carrying out the project plan.
- It is in this process that the PM and the project team must coordinate and direct the various technical and organizational interfaces that exist in the project.
- Compass – typically, this is accomplished via:
 - Regular standing project meetings (usually weekly).
 - Use of the Request for Service system for assignment of resources.
 - Implementation of any approved changes into the project plan.
 - Your experience?

Project Integration Management (cont.)

- Integrated Change Control
 - Requires maintaining the integrity of the project baseline, ensuring that any changes are reflected in the project scope and coordinating changes across all affected areas.
 - Compass – typically, this is accomplished via:
 - Formal documentation of a change to the project scope, approved by the Project Steering Committee.
 - Change Management systems and processes.
 - Updated project plans and budgets.
 - Your experience?

Project Scope Management

- PMBOK states that Project Scope Management includes the processes required to ensure that the project includes all the work required, **AND ONLY THE WORK REQUIRED**, to ensure that the project is completed successfully.
- The key point is that the project work should include only that work that is required to complete the project successfully.
- The major project scope management processes are:
 - Scope Planning and Definition.
 - Scope Change Control.

Project Scope Management (cont.)

- Project Scope Planning and Definition:
 - To develop the project scope you need:
 - Product description.
 - Project charter.
 - Project assumptions and constraints.
 - Compass experience: need all of these plus:
 - Stakeholder Input.
 - Agreement between all stakeholders.
 - Your experience: ?

Project Scope Management (cont.)

- Project Scope Change Control: You must have a scope management change control system in order to successfully manage scope change.
 - Compass experience: Absolutely agree! Most unsuccessful projects can be tied to a lack of project scope management.
 - Valid scope change reasons: inadequate product or project planning, an external event (i.e. regulatory change), a value-added change, contingency plan implementation.
 - Your experience: ?

Wrap-Up

- Questions and Comments