



*This document is part of a series that explain the newly released PMBOK 5th edition. These documents provide simple explanation and summary of the book. However they do not replace the necessity of reading the book.*

## Intro, Project Life Cycle, & 5 Group Processes

Based on PMBOK® Guide 5TH Edition

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# Section One

## Introduction

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## ➤ **Project Management Body of Knowledge**

The PMBOK® Guide is the standard for managing most projects most of the time across many types of industries. This standard describes the project management processes, tools, and techniques used to manage a project toward a successful outcome.

## ➤ **What is a Project?**

A **project** is a temporary endeavor undertaken to create a unique product, service, or result.

- **Temporary:** Has a defined beginning and end.
- **Unique:** The product or service is different in some way from all similar products or services.
- **Progressive elaboration:** Continuously improving and detailing a plan as more detailed and specific information become available as the project progresses

**Projects**  means of achieving an organization's strategic plan.

**Projects** can create a product, a service, an improvement and a result.

### **Projects and Operations:**

- Operations are ongoing and repetitive
- Projects are temporary and unique

## ➤ **Projects, Programs and Portfolios;**

- **Programs and Program Management:**

- A Program is a group of related projects managed in coordinated way to obtain benefits and control not available from managing them individually.
- Program management is the centralized, coordinated management of a group of projects to achieve the program's strategic objectives and benefits.

- **Portfolio and Portfolio Management:**

- A Portfolio is a collection of projects or programs and other work that are grouped together to facilitate effective management of that work to meet strategic business objectives.
- Portfolio management is the centralized management of one or more portfolios, which includes identifying, prioritizing, authorizing, managing, and controlling projects, programs and other related work.

- **Projects and Strategic Planning:**

Projects are often utilized as a means of achieving an organization's strategic plan. Projects are typically authorized as a result of one or more of the following strategic considerations:

- Market demand
- Strategic opportunity/business need
- Social need
- Environmental consideration
- Customer request
- Technological advance
- Legal requirements

- **Sub projects:**

Projects are frequently divided into more manageable components or subprojects.

## ➤ **Project Managers and PMO:**

- The **project manager** focuses on the specified project objectives, while the **PMO Manages** major program scope changes which may be seen as potential opportunities to better achieve business objectives.
- The **project manager** controls the assigned project resources to best meet project objectives while the **PMO** optimizes the use of shared organizational resources across all projects.
- The **project manager** manages the constraints (scope, schedule, cost, quality, etc.) of the individual projects while the **PMO** manages the methodologies, standards, overall risk/opportunity & interdependencies among projects at the enterprise level.
- There are several types of PMO structure; **supportive, controlling** and **directive**.

## ➤ **Operations Management:**

- Operation management is responsible for overseeing, directing, and controlling business operations.
- Operations evolve to support day-to-day business, and are necessary to achieve strategic and tactical goals of the business.
- Ongoing operations are outside Of the scope of a project, however, there are intersecting points where the two areas across. Such as, but not limited to:
  - At each closeout phase
  - When developing a new product
  - While improving operations.
  - Until the end of product life cycle
- It is so important for PM to include operational stakeholders in all work and endeavors. As the operational stakeholders should be engaged and



their needs identified as part of the stakeholders register, and their influence should be addressed as part of the risk management plan.

- Example of operational stakeholders:
  - Plant operator
  - Manufacturing line supervisors
  - Help desk staff
  - Production system support
  - Salespersons
  - Maintenance workers
  - Call center personal
  - Retail workers
  - Line managers
  - Training officers

## ➤ **Organizations and Project Management:**

- Organizations use governance to establish strategic directions and performance parameters.
- Project management activities should be aligned with top-level business directions, and if there is a change, the project objectives need to be realigned.

## ➤ **Project Based Organization (PBOs)**

- Creating temporary systems for carrying out the organization work.
- Can be implemented by different types of organizations (functional, matrix, or projectized)
- PBOs can be referring to either entire firms or can be nested within subsidiaries or divisions of large corporations.

## ➤ **The Project Management and Organizational Governance**

- Organizational governance criteria can impose constraints on projects especially if the project delivers a service which will be subject to strict organizational governance.
- It is so important for project manager to be knowledgeable about corporate organizational governance policies and procedures.

## ➤ **Business Values:**

- Business value is defined as the entire value of the business, the total sum of all tangible and intangible elements.
- Business value is a concept that is unique to each organization.
- All organizations focus on attaining business value for their activities.
- Successful business value realization begins with comprehensive strategic planning and management.

## ➤ **What is Project Management?**

**Project management** is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.

### **Managing projects includes:**

- General Business Management (consistently producing results expected by stakeholders)
- Leading (establishing direction, aligning resources, motivating)
- Communicating (clear, unambiguous, and complete)
- Negotiating (conferring with others to reach an agreement)
- Problem Solving (definition and decision making)
  - Distinguish causes and symptoms
  - Identify viable solutions
- Influencing Organization (understanding power and politics)
- Requirements identification.
- Define clear and achievable objectives.
- Balancing the competing demands (scope, time, cost, quality, risks ...).
- Adapting the specifications, plans, and approach to the different concerns and expectations of the various stakeholders.

Project management is accomplished through the appropriate application and integration of the 47 logically-grouped project management processes comprising the 5 Process Groups:

- Initiating,
- Planning,
- Executing,
- Monitoring and Controlling, and
- Closing.

## ➤ The Project Manager

- Is the person assigned to lead the team that is responsible for achieving the project objectives.
- The only point of contact for the project.
- PM responsibilities includes:
  - Planning the work
  - Organizing the work
  - Managing the day-day activities
  - Delivering the project deliverables to the client
  - Identifying potential stakeholders
  - Balancing the competing demands
- The project manager should possess the following skills:
  - **Knowledge:** what the PM knows about project management
  - **Performance:** What PM is able to accomplish
  - **Personal:** How does the PM behave, his/her personality, leadership skills...

- Effective PM requires a balance of ethical, interpersonal, and conceptual skills.
- Important Interpersonal skills:
  - Leadership
  - Team building
  - Motivation
  - Communication
  - Influencing
  - Decision Making
  - Political and culture awareness
  - Negotiation
  - Trust building
  - Conflict Management
  - Coaching & mentoring

## ➤ Project Team

- The project team includes the project manager and the group of individuals who act together in performing work of the project to achieve its objectives
- The project team includes the project manager, the project management staff, and other team members who carry out the work, but who are necessarily involved with management of the project.
- Project team includes roles such as:
  - Project management staff
  - Project staff
  - Supporting experts
  - User or customer representatives
  - Sellers
  - Business partner members
  - Business partners



## ➤ Stakeholders

- Individuals and organizations who are actively involved in the project
- Often have conflicting expectations and objectives
- In general, differences should be resolved in favor of the customer – individual(s) or organization(s) that will use the outcome of the project
- Stakeholder management is a proactive task
- Project Managers must determine all stakeholders and incorporate their needs into the project
- Stakeholders are:
  - Project Managers
  - Customers
  - Performing organizations, owners
  - Sponsor
  - Team
  - Internal/external
  - End user
  - Society, citizens
  - Others: owner, funders, supplier, contractor



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# Section Two

Organizational Influences &  
Project Life Cycle

## ➤ Organizational Cultures

Organizational culture is shaped by common experiences of members of the organization, and most organizations have developed their own unique culture.

- Common experiences include:
  - Shared vision, values, beliefs, and expectations
  - Regulations, polices, methods, and procedures
  - Risk tolerance
  - View of leadership, hierarchy, and authority relationships
  - Code of conduct, work ethic, and work hours
  - Operating environment
  
- The organizational culture is considered as an enterprise environmental factors

## ➤ Organizational Structures

- All organizations are structured in one of three ways:
  - **Functional**
    - Advantages:
      - Enduring Organizational structure
      - Clear career path with separation of functions
      - Employees have one supervisor with clear chain of command
    - Disadvantages:
      - Project manager has little to no more formal authority
      - Multiple projects compete for limited resources and priority
      - Project team members are loyal to the functional manager

- **Projectized**

- Advantages:

- Organizational resources are dedicated to projects
    - Project managers almost have ultimate authority
    - Teams are formed and often collocated
    - Loyalties are to project not to a functional manager

- Disadvantages:

- Team members are out of the work at the end of project
    - Inefficiency of team members

- **Matrix**

- Matrix organizations aim to minimize the differences between, and take advantage of the strengths and weaknesses of functional and projectized organizations.

- Matrix organizations are categorized as;

- Strong Matrix: balance of power rests with the project manager

- Weak Matrix: balance of power rests with the Functional manager
- Balanced Matrix: balance of power rests with both the project manager and functional manager
- Many organizations involve all these structures and often referred as a **composite organization**.
- Many organizations include strategic, middle management, and operational levels. And Project manager may **interact** with all levels depending on the following factors:
  - Strategic importance of the project
  - Capacity of stakeholders to exert influence on the project
  - Degree of the project management maturity
  - Project management system
  - Organizational communication

- The Interaction determines:
  - Project manager level of authority
  - Resources availability and management
  - Entity controlling the project budget
  - Project manager's role
  - Project team composition

➤ **Organizational Process Assets** *(are inputs to most planning processes)*

Organizational process assets are the plans, processes, polices, procedures, and knowledge bases.

Organizational process assets are grouped in two categories:

- Process and procedures;
  - Initiating and planning
  - Executing, monitoring and controlling
  - Closing
- Corporate knowledge base;
  - Configuration management knowledge bases
  - Financial databases
  - Historical information and lessons learned
  - Issue and defect management databases
  - Process measurement databases
  - Project files from previous projects



➤ **Enterprise Environmental Factors** *(are inputs to most planning processes)*

EEF refers to conditions, not under the control of the project team, that influence, constrain, or direct the project. EEF includes but not limited to:

- Organizational culture, structure, and governance
- Geographic distribution of facilities
- Government or industry standards
- Infrastructure
- Existing human resources
- Personal administration
- Company work authorization system
- Marketplace conditions
- Stakeholders risk tolerance
- Political climate
- Organization's established communication channels
- Project management information system

## ➤ **Project stakeholders**

- Includes all project members and all interested internal and external entities. (Sponsor, customers, users, sellers, business partners, organizational group, functional managers...etc.)
- The project manager should manage the influences of these various stakeholders in relation to the project requirements to ensure a successful outcome.
- The project manager responsibility is to manage stockholders expectations.
- Stakeholder identification is a continuous process.

## ➤ Project Governance

- Project governance is an oversight function that is aligned with the organization governance model, and encompasses the project life cycle.
- Project governance framework provides the project manager and team with structure, processes, decision-making model and tools for managing the project.
- The Project governance is a critical element of any project that ensures its success by defining, documenting and communicating reliable and, repeatable project practices.
- Project governance involves stakeholders as well as documented policies, procedures, and standards; responsibilities; and authorities.
- The project governance approach should be described in the project management plan.

## ➤ Project Life Cycle

- A project life cycle is the series of **phases** the project passes through from the initiation to its closure
- The life cycle provides the basic framework for managing the project
- The project life cycle can be documented within a methodology
- The project life cycle can range from:
  - **Predictive** (plan-driven approaches): where the product and deliverable are defined at the beginning and any changes to scope are carefully managed
  - **Adaptive** (change-driven approaches or **agile method**): where the product is developed over multiple iterations and detailed scope is defined for each iteration only
- Generic life cycle structure:
  - Starting the project
  - Organizing and preparing
  - Carrying out the project work
  - Closing the project

- Generic life cycle structure is often referred to when communicating with upper management or other less familiar with the details of the project
- Generic project life cycle characteristics
  - Cost and staffing levels are low at start and move higher towards the end
  - Probability of successfully completing project is low at beginning, higher towards the end as the project continues
  - Stakeholder influence is high at the beginning and progressively lowers as the project continues
- The project life cycle is independent from the life cycle of the product produced or modified by the project
- The phases are generally sequential
- The phases can be broken down by functional or partial objectives
- Phases are generally time bounded with start and ending or control point

- Project Phases are marked by the completion of a deliverable (tangible, verifiable work product)
- Review of deliverables and approval/denial are “**phase exits, stage gates, or kill points**”
- Phases are collected into the Project Life Cycle
- Project Life Cycle defines:
  - Technical work performed in each phase
  - Who is involved in each phase
- Phase-to-Phase relationship:
  - Sequential relationship: Starts only when the previous phase is complete
  - Overlapping relationship: a phase starts before completion of the previous one
  - Overlapping is a “Schedule compression technique called **Fast Tracking**”

*You need to understand the terms and the logic relationships between the inputs, outputs and tools & techniques. Memorizing them is not enough and will lead you nowhere.*

*Refer to the PMBoK 5th Edition for more details. &  
Please do not hesitate to contact me anytime if you have any questions, comments, and feedbacks.*

*Success is yours,*

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