

Changes from PMBok v4 to PMBoK v5

Sonja Streuber, PMP® , SSBB



Project Management ▪ Operations Management
Coaching ▪ Consulting ▪ Training

Sonja Streuber, PMP®



Project Mgmt & Engineering, Six Sigma, Risk Mgmt & Risk Analysis:

- 2000 – 2003 Agilent Technologies
- 2003 – 2009 Lockheed Martin
- 2009 – 2011 ITT Exelis
- 2011 – present Valparaiso University
- 2012: Founded PMReboot
- 2012 – present: F1, Inc. @ NiSource

Education, Certifications:

- Six Sigma Black Belt, Caterpillar Corp., 2012
- PMP®, Project Management Institute, 2010
- M.S. (Systems Engineering), George Washington U
- M.A./ A.B.D. (English), UC Davis

Agenda

- Overview
- DIKW and Redefinitions
- Process Additions
- Process Revisions
- New Knowledge Area:
13. Project Stakeholder Management
- Summary



Overview

- **New processes:** 5
- **Revised processes:** 13
- **New knowledge area:** 1 (13. Project Stakeholder Mgmt)
- **New standard:** Project Mgmt Standard (former Chapter 3) is now an ANSI Standard & has been shifted to Appendix A
- **New definitions:** Work performance data, work performance information, work performance reports redefined in alignment with Information Hierarchy from Knowledge Management discipline:
 - **DIKW:** Data, Information, Knowledge, Wisdom
 - Impacts all Controlling and Executing processes

Basis for PMP® exam starting July 31, 2013.

Basis for CAPM® exam starting July 1, 2013.

Overview

Table A1-1. Project Management Process Group and Knowledge Area Mapping

Knowledge Areas	Project Management Process Groups				
	Initiating Process Group	Planning Process Group	Executing Process Group	Monitoring and Controlling Process Group	Closing Process Group
4. Project Integration Management	4.1 Develop Project Charter	4.2 Develop Project Management Plan	4.3 Direct and Manage Project Work	4.4 Monitor and Control Project Work 4.5 Perform Integrated Change Control	4.6 Close Project or Phase
5. Project Scope Management		5.1 Plan Scope Management 5.2 Collect Requirements 5.3 Define Scope 5.4 Create WBS		5.5 Validate Scope 5.6 Control Scope	
6. Project Time Management		6.1 Plan Schedule Management 6.2 Define Activities 6.3 Sequence Activities 6.4 Estimate Activity Resources 6.5 Estimate Activity Durations 6.6 Develop Schedule		6.7 Control Schedule	
7. Project Cost Management		7.1 Plan Cost Management 7.2 Estimate Costs 7.3 Determine Budget		7.4 Control Costs	
8. Project Quality Management		8.1 Plan Quality Management	8.2 Perform Quality Assurance	8.3 Control Quality	
9. Project Human Resource Management		9.1 Plan Human Resource Management	9.2 Acquire Project Team 9.3 Develop Project Team 9.4 Manage Project Team		
10. Project Communications Management		10.1 Plan Communications Management	10.2 Manage Communications	10.3 Control Communications	
11. Project Risk Management		11.1 Plan Risk Management 11.2 Identify Risks 11.3 Perform Qualitative Risk Analysis 11.4 Perform Quantitative Risk Analysis 11.5 Plan Risk Responses		11.6 Control Risks	
12. Project Procurement Management		12.1 Plan Procurement Management	12.2 Conduct Procurements	12.3 Control Procurements	12.4 Close Procurements
13. Project Stakeholder Management	13.1 Identify Stakeholders	13.2 Plan Stakeholder Management	13.3 Manage Stakeholder Engagement	13.4 Control Stakeholder Engagement	

Process/ Knowledge Area Mapping Table

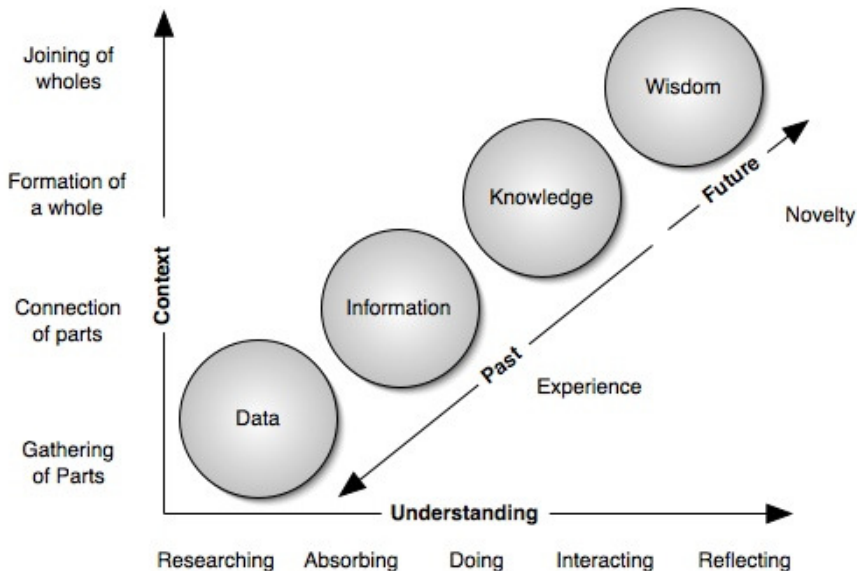
- The table you need to memorize for the PMP® exam
- Moved to Appendix A, p. 423
- Several inputs & outputs have been renamed

Agenda

- Overview
- **DIKW and Redefinitions**
- Process Additions
- Process Revisions
- New Knowledge Area:
13. Project Stakeholder Management
- Summary



DIKW and Redefined Outputs



[Continuum of Understanding](#), D. Clark (2004, 2010)



Pyramid view of information Hierarchy

Deepened philosophical approach to understanding data tracked during project planning and execution.

Redefinitions—DIKW

- **Work Performance Data:** The raw observations and measurements identified during activities performed to carry out the project work (% work complete etc.)
- **Work Performance Information:** The performance data collected from various controlling processes, analyzed in context, and integrated based on relationships across areas (deliverable status, ETCs, etc.)
- **Work Performance Reports:** The physical or electronic representation of work performance information compiled in project documents, intended to generate decisions, raise issues, actions, or awareness (status reports etc.)

Redefinitions—DIKW

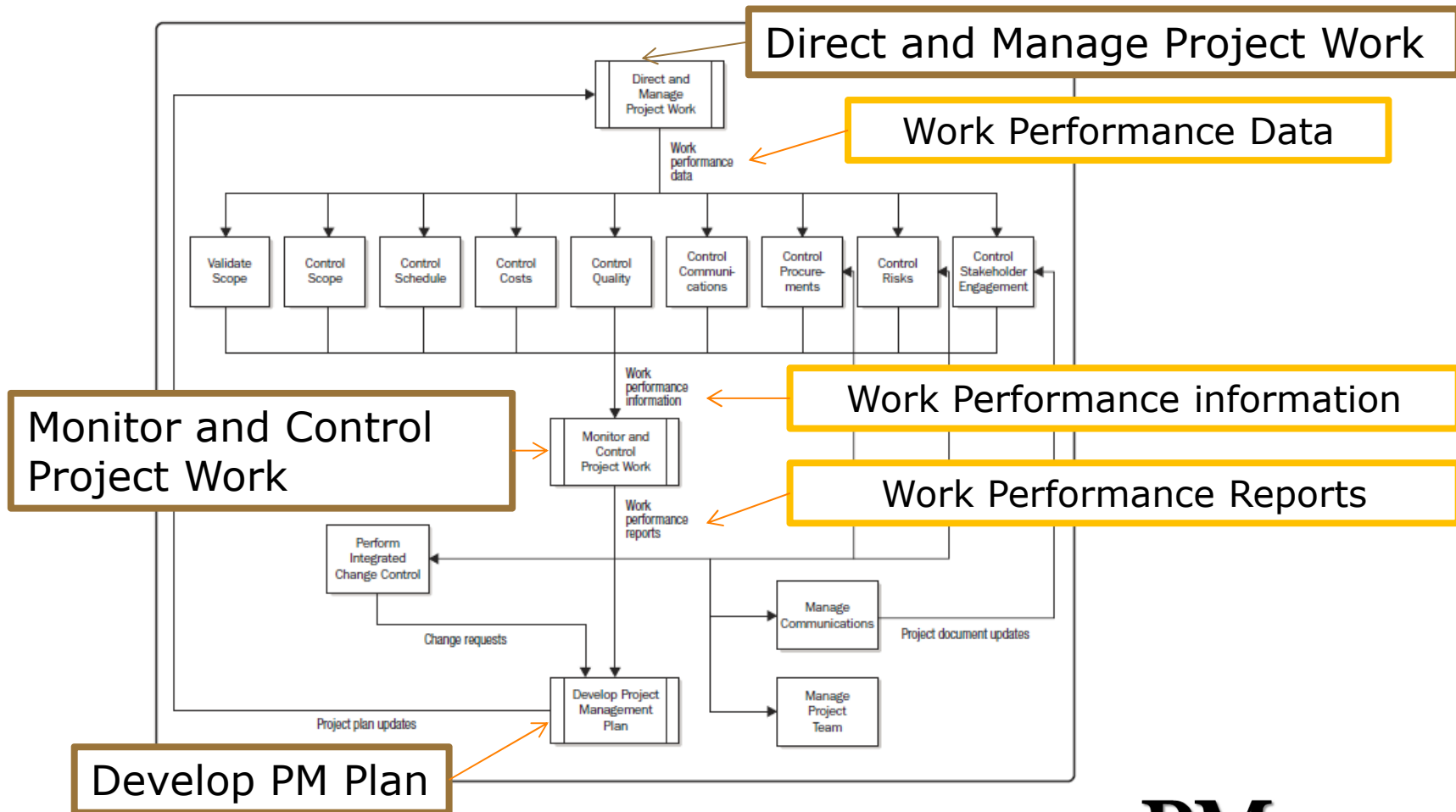


Figure X1-1. Refined Data Model

Agenda

- Overview
- DIKW and Redefinitions
- **Process Additions**
- Process Revisions
- New Knowledge Area:
13. Project Stakeholder Management
- Summary

Process Changes: Additions

- 5.1 Plan Scope Management
- 6.1 Plan Schedule Management
- 7.1 Plan Cost Management
- 13.2 Plan Stakeholder Management
- 13.4 Control Stakeholders Engagement



Process Changes: Additions

5.1 Plan Scope Management

- How project scope is defined, validated, controlled

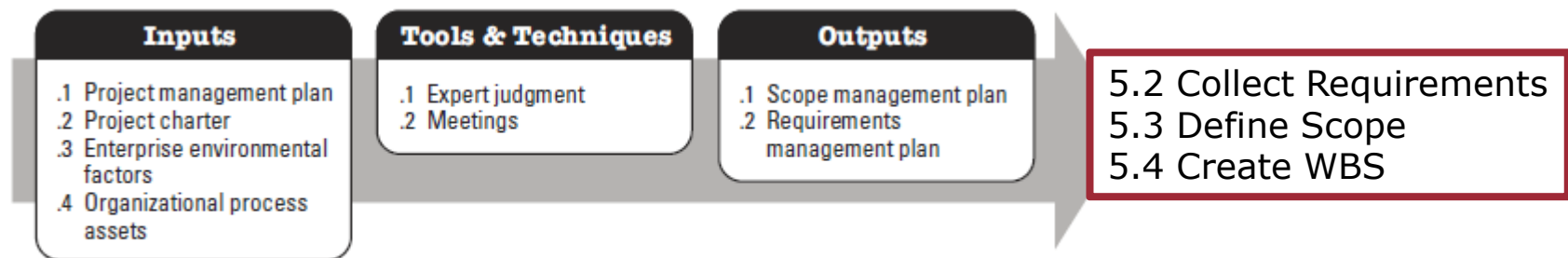


Figure 5-2. Plan Scope Management: Inputs, Tools & Techniques, and Outputs

- Requirements Management Plan reflects project cycle methodology (waterfall, agile, etc.), which necessitates stronger requirements configuration mgmt incl. prioritization, product metrics usage, traceability

Process Changes: Additions

6.1 Plan Schedule Management

- Focus on preliminary decisions around developing and maintaining project schedule model (includes agile concepts, esp. in later Develop Schedule process)

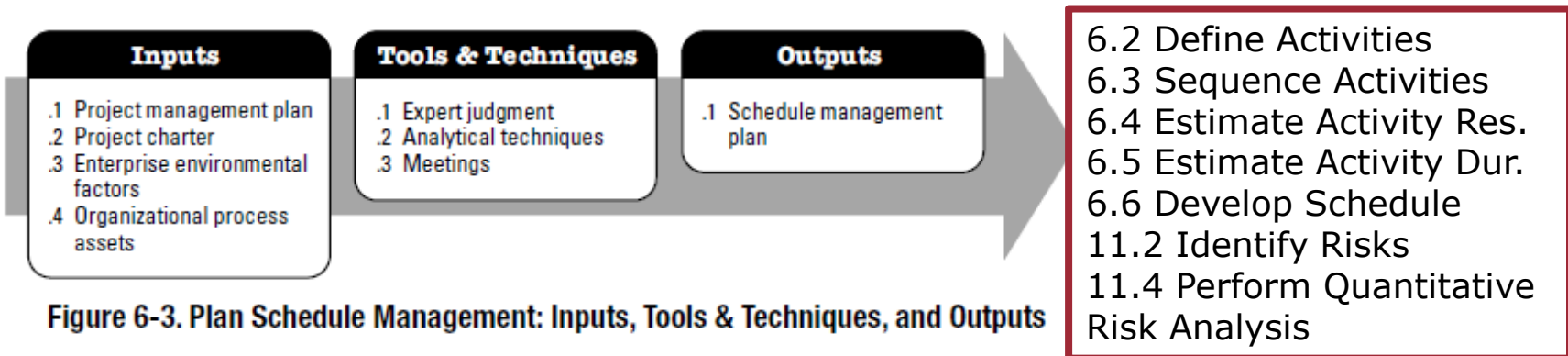


Figure 6-3. Plan Schedule Management: Inputs, Tools & Techniques, and Outputs

- Schedule Management Plan: How schedule contingencies will be reported and assessed, variance thresholds

Process Changes: Additions

7.1 Plan Cost Management

- Establishes policies, procedures, documentation for planning, managing, expending, controlling project costs
- Consider stakeholder requirements for managing costs
- Added emphasis on reserve analysis (contingency, MR)

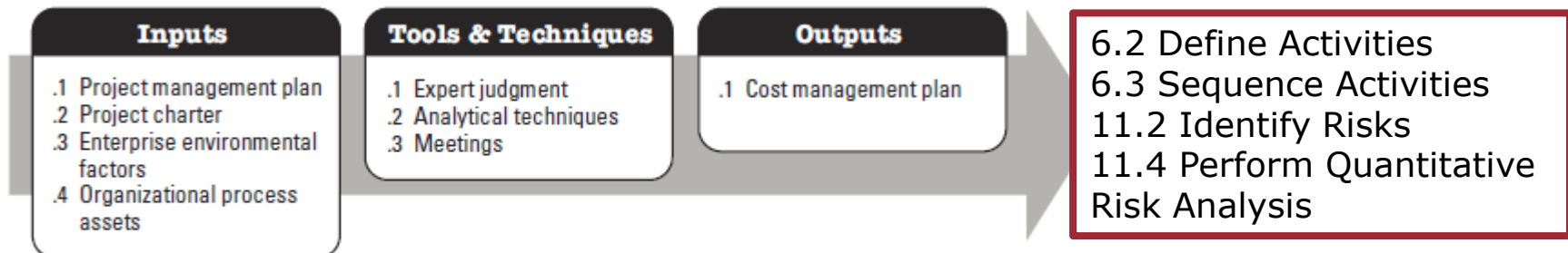


Figure 7-2. Plan Cost Management: Inputs, Tools & Techniques, and Outputs

- Can include strategic options for project financing and financial techniques, e.g. payback period, ROI, IRR, discounted cash flow, NPV

Agenda

- Overview
- DIKW and Redefinitions
- Process Additions
- **Process Revisions**
- New Knowledge Area:
13. Project Stakeholder Management
- Summary

Process Changes: Revisions

#	v4	v5
4.3	Direct and Manage Project Execution	Direct and Manage Project Work
5.5	Verify Scope	Validate Scope
8.1	Plan Quality	Plan Quality Mgmt
8.3	Perform Quality Control	Control Quality
9.1	Develop Human Res. Plan	Plan Human Res. Mgmt
10	10.2 Plan Communications	10.1 Plan Communications Mgmt
10	10.3 Distribute Information	10.2 Manage Communications
10	10.5 Report Performance	10.3 Control Communications
11.6	Monitor and Control Risks	Control Risks
12.1	Plan Procurements	Plan Procurement Mgmt
12.3	Administer Procurements	Control Procurements
13	10.1 Identify Stakeholders	13.1 Identify Stakeholders
13	10.4 Manage Stakeh Expectations	13.3 Manage Stakeh Engagement

Process Changes: Revisions

- Processes renamed to emphasize their nature and to support consistency in naming the processes that create subsidiary plans.
- Administrative-sounding processes renamed to "Control"
- Expanded explanations
- ITTO revisions to reflect the new model of project data and information flow during the execution of project work; some renamed to support consistency between the various PM processes.

Agenda

- Overview
- DIKW and Redefinitions
- Process Additions
- Process Revisions
- New Knowledge Area:
13. Project Stakeholder Management
- Summary

New: 13. Stakeholder Management

Rationale for Introduction

- Focuses on not only managing the expectations of the various stakeholder groups but actively working to ensure an appropriate level of engagement of project stakeholders in the decision making and activities of the project.
- Emphasizes that stakeholder engagement is one of the keys to overall project success.

Focus

- Continuous communication with stakeholders to understand their needs & expectations, addressing issues as they occur, managing conflicting interests and fostering appropriate stakeholder engagement in project decisions and activities. Stakeholder satisfaction should be managed as a key project objective.

New: 13. Stakeholder Management

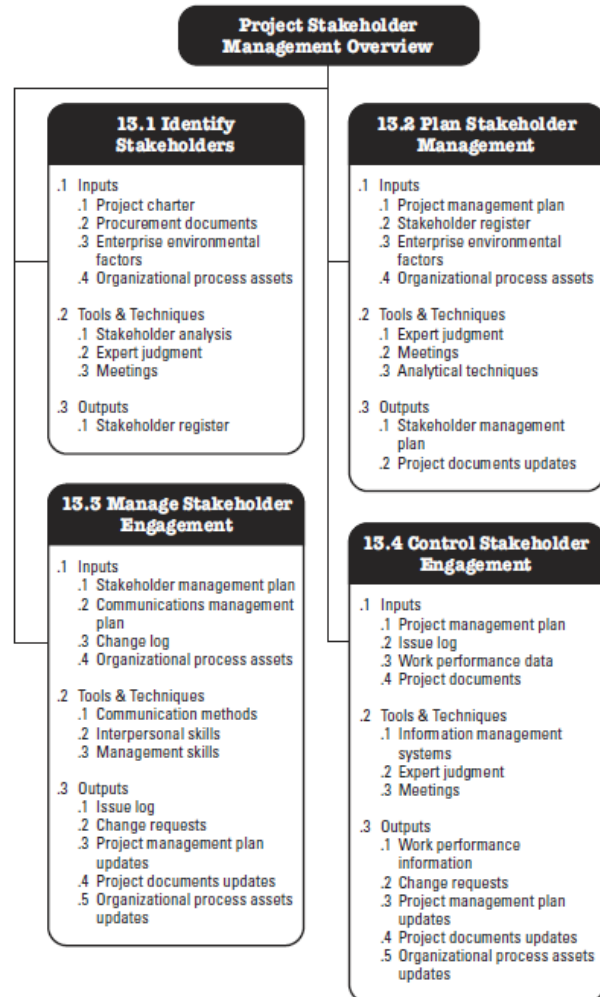


Table X1-10. Section 13 Changes

Fourth Edition Sections	Fifth Edition Sections
10.1 Identify Stakeholders	13.1 Identify Stakeholders
	13.2 Plan Stakeholder Management
10.4 Manage Stakeholders Expectations	13.3 Manage Stakeholder Engagement
	13.4 Control Stakeholder Engagement

New: 13. Stakeholder Management

13.1 Identify Stakeholders—identify people, groups, or organizations that could impact or be impacted by a decision, activity, or outcome of the project; analyze & document relevant information regarding their interests, involvement, interdependencies, influence, and potential impact on project success.

13.2 Plan Stakeholder Management—develop appropriate management strategies to effectively engage stakeholders throughout the project life cycle, based on the analysis of their needs, interests, and potential impact on project success.

13.3 Manage Stakeholder Engagement—communicate and work with stakeholders to meet their needs/ expectations, address issues as they occur, and foster appropriate stakeholder engagement in project activities throughout the project life cycle.

13.4 Control Stakeholder Engagement—monitor overall stakeholder relationships and adjust strategies and plans for engaging stakeholders.

New: 13. Stakeholder Management

13.1 Identify Stakeholders—id people, groups, or organizations that could impact or be impacted by a decision, activity, or outcome of the project; analyze & document relevant information regarding their interests, involvement, interdependencies, influence, and potential impact on project success.

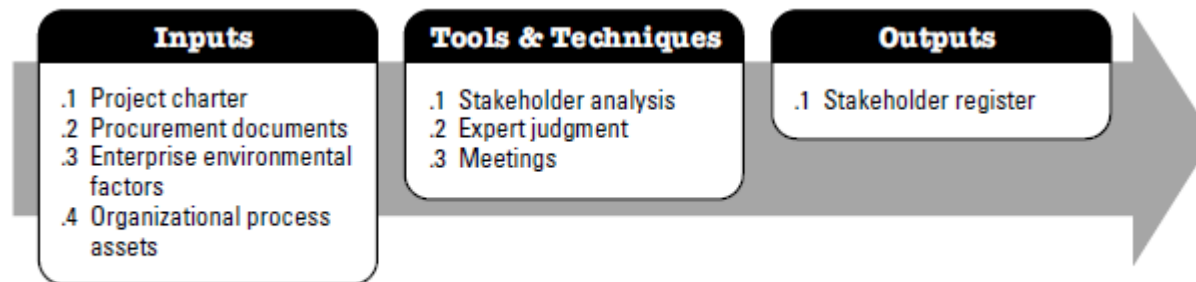


Figure 13-2. Identify Stakeholders: Inputs, Tools & Techniques, and Outputs

New: 13. Stakeholder Management

13.2 Plan Stakeholder Management—develop appropriate management strategies to effectively engage stakeholders throughout the project life cycle, based on the analysis of their needs, interests, and potential impact on project success.



Figure 13-5. Plan Stakeholder Management: Inputs, Tools & Techniques, and Outputs

- Stakeholder Management Plan:
 - Identifies management strategies required to effectively engage stakeholders
 - Structured relative to project needs
 - Includes: Desired and current engagement levels of key stakeholders, scope and impact of change to stakeholders, identified interrelationships and potential overlap between stakeholders, stakeholder communication requirements, information distribution

New: 13. Stakeholder Management

13.3 Manage Stakeholder Engagement—communicate and work with stakeholders to meet their needs/ expectations, address issues as they occur, and foster appropriate stakeholder engagement in project activities throughout the project life cycle.

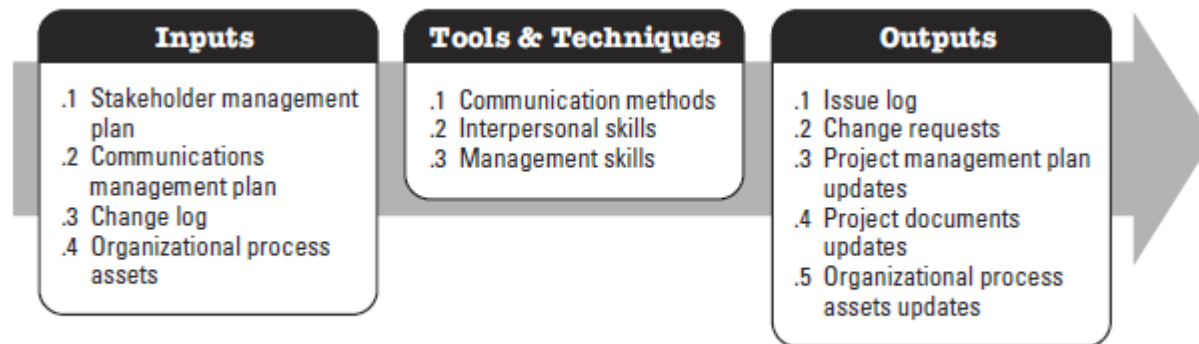


Figure 13-8. Manage Stakeholder Engagement: Inputs, Tools & Techniques, and Outputs

- Increases support and minimizes resistance from stakeholders, significantly increasing the changes to achieve project success.

New: 13. Stakeholder Management

13.4 Control Stakeholder Engagement—monitor overall stakeholder relationships and adjust strategies and plans for engaging stakeholders. Will maintain or increase effectivity of stakeholder engagement activities.

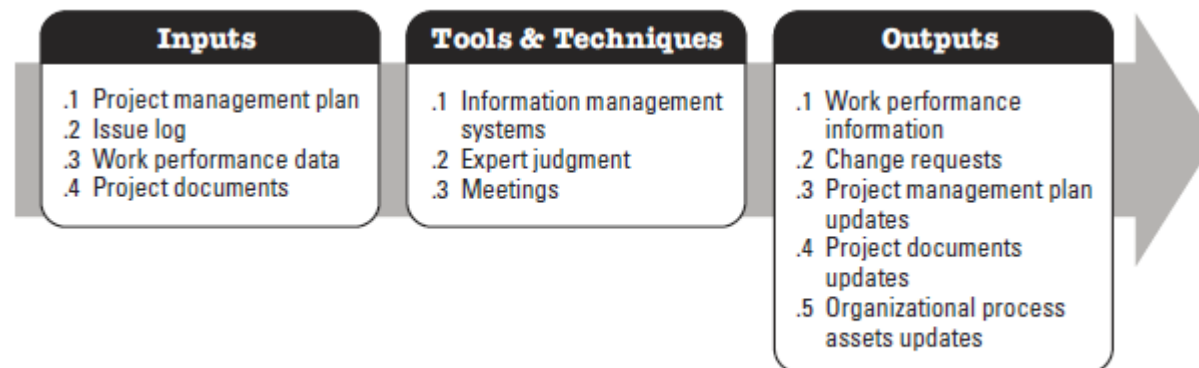


Figure 13-10. Control Stakeholder Engagement: Inputs, Tools & Techniques, and Outputs

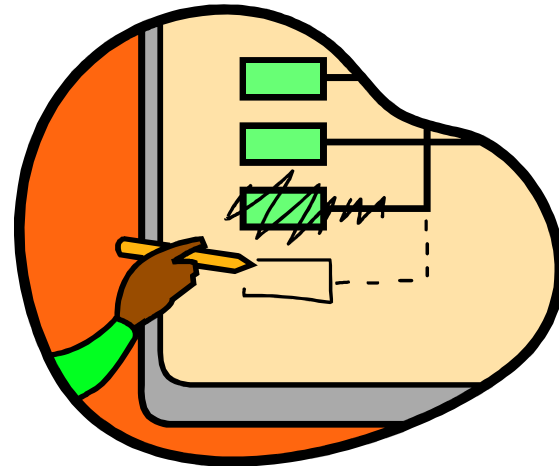
Agenda

- Overview
- DIKW and Redefinitions
- Process Additions
- Process Revisions
- New Knowledge Area:
13. Project Stakeholder Management
- **Summary**

Summary

PMBok v5 introduces significant changes

- Process changes
- Added processes
- Renamed Inputs & Outputs
- New knowledge area:
Stakeholder Management
- Deepened philosophical
approach to the understanding
of work performance data



Increasing emphasis on soft skills.

Questions?

Sonja Streuber, PMP® SSBB

shstreuber@verbalicon.com
info@pmreboot.com



Project Management ▪ Operations Management
Coaching ▪ Consulting ▪ Training

2/27/2013



28