

# Table of content

Foreword 4 <sup>th</sup> edition	i
Foreword 2 <sup>nd</sup> and 3 <sup>rd</sup> edition	ii
<b>Introduction</b>	xvii
The word " <b>competence</b> "	xviii
Projects, programmes and portfolios	xix
An alternative definition	xxi
How to use this book and the website	xxii
The book.....	xxii
The website .....	xxiii
Target audience.....	xxiii
The transition from the third to the fourth edition	xxv

## A. Practice

### A1 Design

A1-1 Definitions and key concepts	4
A1-2 Introduction	5
A1-3 Actions	5
1. Recognize success criteria, classify and discuss these .....	5
2. Discuss the lessons learned, apply and exchange these.....	7
3. Determine complexity and consequences for the management approach .....	8
4. Choose the best management approach and discuss it.....	9
A1-4 Special Topics	11
1. The Management Approach .....	11
2. The pragmatic manifesto .....	13
3. Project success .....	14
4. The diamond approach.....	16
5. Initiation Documentation.....	18
A1-5 Assignments	19
A1-6 eSchool	20

### A2 Requirements, objectives and benefits

A2-1 Definitions and key concepts	22
A2-2 Introduction	22
A2-3 Actions	23
1. Introduce a hierarchy into the goals/benefits.....	23
2. Identify and analyze stakeholder needs and requirements .....	25
3. Prioritize the requirements and determine acceptance criteria .....	26
A2-4 Special topics	28
1. Volere Requirements Specification Template .....	28
2. Value Management.....	29
3. MoSCoW .....	31
A2-5 Assignments	31
A2-6 eSchool	32



## Table of content

### A3 Scope

A3-1 Definitions and key concepts	34
A3-2 Introduction	35
A3-3 Actions	36
1. Describe the deliverables .....	36
2. Structure the scope .....	38
3. Describe the work packages .....	40
4. Determine and maintain the configuration.....	41
A3-4 Special Topics	42
1. Decomposition of the scope .....	42
2. Work Breakdown Structure.....	44
3. Product oriented planning.....	52
4. Configuration Management .....	53
A3-5 Assignments	55
A3-6 eSchool	56

### A4 Time

A4-1 Definitions and key concepts	58
A4-2 Introduction	58
A4-3 Actions	59
1. Determine the necessary activities.....	59
2. Determine the necessary effort and duration .....	60
3. Determining the approach to the phasing.....	61
4. Sequence the activities and plan the duration.....	62
5. Manage the duration.....	65
A4-4 Special Topics	68
1. Concepts of time.....	68
2. Various methods of phasing .....	68
3. Develop the planning network .....	70
4. Date constraints.....	71
5. Gantt Chart.....	72
6. Crashing and fast-tracking.....	74
7. PERT .....	75
A4-5 Assignments	75
A4-6 eSchool	76

### A5 Organization and information

A5-1 Definitions and key concepts	78
A5-2 Introduction	79
A5-3 Actions	80
1. Determine the information needs of the stakeholders.....	80
2. Define the functional roles, responsibilities and organization structure.....	81
3. Implement processes and infrastructure .....	84
4. Implement and maintain the temporary organization .....	85
A5-4 Special Topics	88
1. Roles in the project.....	88
2. The roles in a program .....	91
3. RACI table .....	92
4. Team structure.....	93
5. The Project/programme Management Information System.....	93
6. Project Management Documents .....	95



7. The core documents in a programme.....	96
8. Document Management.....	96
A5-5 Assignments.....	99
A5-6 eSchool.....	100
<b>A6 Quality</b>	
A6-1 Definitions and key concepts.....	102
A6-2 Introduction.....	104
A6-3 Actions.....	105
1. Develop and use a quality plan.....	105
2. Assess (review) the quality of deliverables.....	107
3. Verify the quality performance.....	108
4. Plan and organize the validation of deliverables.....	108
A6-4 Special Topics.....	110
1. The quality gurus.....	110
2. Assurance and Control.....	112
3. The cost of quality.....	113
4. Assessments and audits.....	116
5. The seven tools of quality.....	117
A6-5 Assignments.....	125
A6-6 eSchool.....	126
<b>A7 Finance</b>	
A7-1 Definitions and key concepts.....	128
A7-2 Introduction.....	128
A7-3 Actions.....	129
1. Estimate the project/programme/portfolio costs.....	129
2. Determine the project/programme/portfolio budget.....	132
3. Secure the financial resources.....	133
4. Establish the management and reporting of the finances.....	134
5. Monitor the finances.....	135
A7-4 Special Topics.....	138
1. Cost Breakdown Structure.....	138
2. Project/programme financing.....	139
3. Financing options.....	140
4. Public Private Partnership.....	140
5. Islamic Financing.....	141
6. Price risks.....	142
7. Sarbanes-Oxley.....	142
A7-5 Assignments.....	143
A7-6 eSchool.....	144
<b>A8 Resources</b>	
A8-1 Definitions and key concepts.....	146
A8-2 Introduction.....	146
A8-3 Actions.....	147
1. Develop a strategic resource plan.....	147
2. Determine the quality and quantity of the resources.....	148
3. Acquire the required resources.....	149
4. Allocate the acquired resources.....	151
5. Monitor resource usage.....	152



## Table of content

A8-4 Special Topics	154
1. RBS: Resource Breakdown Structure .....	154
2. Critical Chain .....	155
A8-5 Assignments	157
A8-6 eSchool	158
<b>A9 Procurement and partnership</b>	
A9-1 Definitions and key concepts	160
A9-2 Introduction	160
A9-3 Actions	162
1. Agree on needs, options and processes .....	162
2. Participate in the supplier selection .....	163
3. Participate in the negotiation .....	164
4. Manage the contracts .....	165
A9-4 Special Topics	169
1. Full Analytical Criteria Method .....	169
2. Public tendering in Europe .....	171
3. Contract Results .....	174
4. Incoterms .....	175
5. Contract pricing .....	176
6. Outsourcing .....	177
A9-5 Assignments	179
A9-6 eSchool	180
<b>A10 Plan and control</b>	
A10-1 Definitions and key concepts	182
A10-2 Introduction	184
A10-3 Actions	184
1. Draw up a project management plan and get it approved .....	184
2. Initiate and manage the transition to a new phase .....	186
3. Compare the actual situation to the plan and take action .....	187
4. Report on the progress .....	188
5. Handle change requests .....	189
6. Close-out of a phase, or the project, and evaluate it .....	194
A10-4 Special Topics	200
1. Delegating .....	200
2. Goal Setting .....	201
3. Estimation methods .....	201
4. The Earned Value Method .....	204
5. Slip Chart .....	207
6. Issue register and report .....	209
A10-5 Assignments	211
A10-6 eSchool	212
<b>A11 Risk and opportunity</b>	
A11-1 Definitions and key concepts	214
A11-2 Introduction	215
A11-3 Actions	217
1. Develop and implement a risk management framework .....	217
2. Identify risks and opportunities .....	219
3. Assess the probability and the impact .....	220
4. Select and implement response .....	221



5. Evaluate and monitor risks, opportunities and responses .....	224
A11-4 Special Topics .....	226
1. Risk management principles .....	226
2. Risk log or Register .....	226
3. Risk analysis techniques .....	228
4. The "insurance premium" .....	232
5. Decision trees.....	232
6. Monte Carlo Simulation .....	233
7. Sensitivity analysis .....	234
A11-5 Assignments .....	235
A11-6 eSchool .....	236
<b>A12 Stakeholders</b> .....	
A12-1 Definitions and key concepts .....	238
A12-2 Introduction .....	238
A12-3 Actions .....	239
1. Identify and analyze interests and stakeholders.....	239
2. Develop and maintain the stakeholder strategy and communication .....	240
3. Ensure that senior management is involved.....	242
4. Ensure that users, partners and suppliers are involved .....	242
5. Organize and maintain networks and alliances .....	243
A12-4 Special Topics .....	245
1. Stakeholder categories.....	245
2. Analysis of Interested parties.....	247
A12-5 Assignments .....	251
A12-6 eSchool .....	252
<b>A13 Change and transformation</b> .....	
A13-1 Definitions and key concepts .....	254
A13-2 Introduction .....	254
A13-3 Actions .....	255
1. Assess the adaptability of the organization(s) .....	255
2. Identify change requirements and options.....	256
3. Develop a change strategy.....	257
4. Implement the change .....	258
A13-4 Special Topics .....	259
1. Unfreeze-Change-Freeze.....	259
2. Dealing with opposition.....	261
3. The coping curve .....	262
4. The diffusion of innovations.....	263
5. Strategic change according to John P. Kotter.....	265
6. Change in Five Colors .....	267
7. Change is inevitable .....	270
8. The learning organization .....	273
9. Business Model Canvas .....	274
A13-5 Assignments .....	275
A13-6 eSchool .....	276
<b>A14 Select and balance</b> .....	
A14-1 Definitions and key concepts .....	278
A14-2 Introduction .....	278



## Table of content

A14-3 Actions	280
1. Identify the components	280
2. Analyze the components	281
3. Prioritize the components	282
4. Create an overview of all deliveries	284
5. Predict the performance of the related components	285
6. Facilitate the decisions to be taken	287
A14-4 Special topics	287
1. The Business Case	287
2. Investment appraisal	291
A14-5 Assignments	296
A14-6 eSchool	297

## B. People

### B1 Self-reflection and self-management

B1-1 Definitions and key concepts	302
B1-2 Introduction	304
B1-3 Actions	305
1. Understand how your values and experience influence the way you work	305
2. Develop self-confidence from your own strong and weak points	306
3. Bring your goals into line with your intrinsic motivation	307
4. Take both the situation and your own resources into account	309
5. Take responsibility for your own learning and development path	310
B1-4 Special topics	312
1. Personality	312
2. Cognitive dissonance	313
3. Defensive Routines	314
4. Emotional Intelligence	316
5. How people learn	317
6. The Johari window	318
7. Core Quadrants	319
8. RT, RET and REBT	320
9. The seven Habits	324
10. Balancing private life and work	325
11. Stress and burnout	326
12. Time management	330
B1-5 Assignments	333
B1-6 eSchool	334

### B2 Personal integrity and reliability

B2-1 Definitions and key concepts	336
B2-2 Introduction	337
B2-3 Actions	337
1. Maintain ethical standards in all decisions and actions	337
2. Facilitate the sustainability of all outcomes	338
3. Take responsibility for your decisions and actions	339
4. Act, decide and communicate consistently	340
5. Build confidence by fulfilling your tasks	341
B2-4 Special Topics	342
1. Reliability	342



2. Ethical Issues .....	343
3. Four different types of ethics .....	343
4. Case study on an ethical issue.....	346
5. Whistleblowers .....	348
B2-5 Assignments .....	349
B2-6 eSchool .....	350
<b>B3 Personal communication</b>	
B3-1 Definitions and key concepts .....	352
B3-2 Introduction .....	353
B3-3 Actions .....	354
1. Communicate clearly and structurally, and test the understanding .....	354
2. Encourage open communication and facilitate this .....	355
3. Align your communication style to the situation.....	356
4. Communicate effectively with virtual teams.....	357
5. Use humor when this is applicable .....	357
B3-4 Special Topics .....	358
1. The communication model .....	358
2. Verbal and Non-Verbal .....	360
3. The five axioms of Watzlawick.....	362
4. Four aspects - Schulz von Thun.....	364
5. The uses of argument.....	367
6. Identify the appropriate style .....	371
7. Rapport.....	373
8. Active listening.....	375
9. Asking the right question .....	378
10. Feedback.....	379
11. Humor .....	380
12. Presentation Skills .....	381
B3-5 Assignments .....	385
B3-6 eSchool .....	386
<b>B4 Relations and engagement</b>	
B4-1 Definitions and key concepts .....	388
B4-2 Introduction .....	389
B4-3 Actions .....	390
1. Develop personal and professional relationships .....	390
2. Build up a social network.....	391
3. Show empathy.....	392
4. Show your trust and respect.....	393
5. Share your vision and goals .....	394
B4-4 Special Topics .....	395
1. Building a relationship .....	395
2. The relationship with the sponsor.....	396
3. The Maslow hierarchy of needs.....	399
4. Motivation-Hygiene Theory.....	401
5. Self-determination Theory .....	403
6. Model I and II.....	407
B4-5 Assignments .....	408
B4-6 eSchool .....	410



## Table of content

### **B5 Leadership**

B5-1 Definitions and key concepts	412
B5-2 Introduction	412
B5-3 Actions	413
1. Act proactively, help and advise	413
2. Be responsible and show involvement	414
3. Give direction, coach and improve the work	415
4. Use the right level of power and influence to achieve goals	416
5. Take decisions, enforce them and dare to change them	418
B5-4 Special Topics	418
1. The development of management thought	418
2. Are you leader or manager?	420
3. Leadership in a multicultural perspective	421
4. Blake & Mouton's Grid	422
5. Theory X, Theory Y	423
6. Fiedler Contingency Model	424
7. Situational Leadership - Hersey & Blanchard	425
8. Power - Hersey & Blanchard	428
9. Coaching leadership	430
10. The GROW model	431
11. Leadership that gets results	432
12. Leadership from a psychoanalytical perspective	434
B5-5 Assignments	436
B5-6 eSchool	438

### **B6 Teamwork**

B6-1 Definitions and key concepts	440
B6-2 Introduction	441
B6-3 Actions	442
1. Select and build up the team	442
2. Encourage cooperation and networking	443
3. Delegate tasks and responsibilities	445
4. Acknowledge mistakes and learn from them	447
B6-4 Special Topics	447
1. Developmental Sequence in Small Groups	447
2. Team roles according to Belbin	449
3. Success factors	451
4. Team building	451
5. Meetings	453
6. Dimensions in group discussions	458
7. Manage towards consensus	459
8. The skillful discussion	460
9. Management of virtual teams	460
10. Problems with teams	463
11. Stress Management and the team	464
B6-5 Assignments	467
B6-6 eSchool	468

### **B7 Conflict and crisis**

B7-1 Definitions and key concepts	470
B7-2 Introduction	470



B7-3 Actions	471
1. Anticipate conflicts and crises.....	471
2. Analyze and take measures .....	473
3. Mediate in conflicts and crises.....	474
4. Learn from the experience gained.....	475
B7-4 Special Topics	476
1. Stages of the conflict .....	476
2. Conflict styles .....	482
3. Diagnosis of conflicts.....	484
4. Solving conflicts.....	487
5. Crisis Management.....	488
B7-5 Assignments	491
B7-6 eSchool	492
<b>B8 Resourcefulness</b>	
B8-1 Definitions and key concepts	494
B8-2 Introduction	495
B8-3 Actions	496
1. Stimulate and support an open, creative work place.....	496
2. Conceptualize when defining situations and strategies.....	497
3. Use analytical techniques to analyze data .....	497
4. Encourage the use of creativity techniques.....	499
5. Encourage an holistic approach to decision making .....	499
B8-4 Special Topics	500
1. Culture and resourcefulness.....	500
2. Intuition.....	501
3. Holistic thinking.....	503
4. System thinking .....	504
5. Creativity techniques .....	506
6. Brainstorming .....	508
7. Edward De Bono .....	509
8. COCD Box.....	511
9. WV model for problem solving.....	511
10. Techniques for proactive problem solving .....	514
11. The Cartesian Product.....	515
B8-5 Assignments	517
B8-6 eSchool	518
<b>B9 Negotiation</b>	
B9-1 Definitions and key concepts	520
B9-2 Introduction	520
B9-3 Actions	521
1. Understand the interests of all parties.....	521
2. Develop sufficient options to satisfy all needs.....	522
3. Design an acceptable strategy to achieve your objectives.....	523
4. Reach an agreement, which is in line with your objectives .....	524
5. Exploit all commercial opportunities .....	525
B9-4 Special topics	526
1. Positional negotiation .....	526
2. The Harvard Method.....	531
3. Dealing with manipulation.....	534
4. Thirty-Six Stratagems .....	536



## Table of content

B9-5 Assignments	546
B9-6 eSchool	548
<b>B10 Result orientation</b>	
B10-1 Definitions and key concepts	550
B10-2 Introduction	550
B10-3 Actions	551
1. Assess all decisions based on their influence on success	551
2. Balance the available resources in order to optimize the outcome	552
3. Create a healthy, safe and productive working conditions	553
4. Sell the project/programme, the processes and the results	554
5. Deliver the result and accomplish acceptance	555
B10-4 Special Topics	556
1. Entrepreneurial spirit	556
2. The act of will	559
3. Assertiveness	562
4. Long term efficiency	564
5. Kaizen	565
B10-5 Assignments	567
B10-6 eSchool	568

## C. Perspective

### C1 Strategy

C1-1 Definitions and key concepts	572
C1-2 Introduction	573
C1-3 Actions	574
1. Bring the project/programme/portfolio in line with mission and vision	574
2. Make use of all the options for influencing the organizational strategy	575
3. Regularly validate the justification	576
4. Keep sight of the critical success factors	577
5. Develop and track the performance indicators	578
C1-4 Special Topics	579
1. Mission, vision and strategy	579
2. Mintzberg on strategy	581
3. Porter's Value Chain	582
4. The SWOT analysis	583
5. Balanced Scorecard	585
6. Benefits Realization Management	587
C1-5 Assignments	589
C1-6 eSchool	590

### C2 Governance, structures and processes

C2-1 Definitions and key concepts	592
C2-2 Introduction	594
C2-3 Actions	595
1. Apply project management principles and guidelines	595
2. Apply programme management principles and guidelines	597
3. Apply portfolio management principles and guidelines	599
4. Follow the guidelines for reporting, decisions and quality	599
5. Follow the guidelines for personnel	600



6. Follow the guidelines for financial management.....	601
<b>C2-4 Topics Permanent Organization</b>	<b>603</b>
1. The organization architecture .....	603
2. Henry Mintzberg .....	606
3. The yearly appraisal cycle .....	608
4. Personal Development Plan .....	609
5. Line versus Project .....	610
6. Total Quality Management .....	612
7. EFQM .....	614
8. Deming's fourteen points .....	616
9. Standardization.....	616
10. Lean.....	618
11. Six Sigma.....	618
12. Accounting.....	619
13. Financial Reporting for General Purpose .....	625
14. OPEX and CAPEX .....	628
15. Financial Ratios .....	628
<b>C2-5 Projects, programmes and portfolios</b>	<b>629</b>
1. Agile.....	629
2. Project management standards and methods.....	631
3. Programmes .....	637
4. The programme management methods .....	638
5. Organizational Competence Baseline (OCB).....	640
6. The Project Excellence Baseline .....	642
7. The Project Management Office.....	643
<b>C2-6 Assignments</b>	<b>644</b>
<b>C2-7 eSchool</b>	<b>646</b>
<b>C3 Compliance, standards and regulations</b>	
<b>C3-1 Definitions and key concepts</b>	<b>648</b>
<b>C3-2 Introduction</b>	<b>649</b>
<b>C3-3 Actions</b>	<b>650</b>
1. Comply with all relevant laws and regulations.....	650
2. Comply with all health, security, safety and environmental legislation. ....	651
3. Comply with all relevant professional codes of conduct.....	652
4. Use professional standards and tools.....	653
5. Improve the organizational project management competence.....	654
<b>C3-4 Special topics</b>	<b>656</b>
1. Law sources .....	656
2. Different Legal systems .....	656
3. Corporate social responsibility.....	657
4. Declaration of Human Rights.....	659
5. Cairo Declaration.....	660
6. Contract law.....	661
7. Intellectual property .....	663
8. Taking extra care of health, security, safety and the environment.....	665
9. Health .....	668
10. Safety .....	669
11. Security.....	671
12. Environment .....	672
<b>C3-5 Assignments</b>	<b>674</b>
<b>C3-6 eSchool</b>	<b>674</b>



*Table of content*

**C4 Power and interest**

C4-1 Definitions and key concepts	676
C4-2 Introduction	676
C4-3 Actions	677
1. Assess ambitions and interests.....	677
2. Assess the informal influence.....	678
3. Assess and use of personalities and working styles.....	679
C4-4 Special Topics	680
1. The basis of social power.....	680
2. PESTLE.....	683
3. The use of formal power.....	684
4. Power in organizations.....	686
5. Political games.....	688
6. Influencing.....	689
C4-5 Assignments	693
C4-6 eSchool	694

**C5 Culture and values**

C5-1 Definitions and key concepts	696
C5-2 Introduction	697
C5-3 Actions	697
1. Assess the dominant culture.....	697
2. Align this with the organization's formal culture and values.....	698
3. Assess the informal culture and values within the organization.....	700
C5-4 Special Topics	701
1. The IPMA Code of Ethics and Professional Conduct.....	701
2. Sustainability and project/programme/portfolio management.....	703
3. Green Project Management.....	704
4. Organizational culture.....	706
5. Cultural Archetypes.....	708
6. Cultural dimensions.....	709
C5-5 Assignments	711
C5-6 eSchool	712

**Index**

713