BSB50820 Diploma of Project Management

Assessor Guide

Contents

Kick-off meeting

Purpose

Kick-off meetings must be recorded as evidence of commencement and uploaded.

The purpose of the kick-off meeting is to introduce yourself and Link Education to the student and plan their progress to graduation.

For some students, the kick-off meeting is the first time they have spoken face-to-face with a real person from Link Education. We must welcome them with friendly professionalism.

Introduction

Q. Tell me a little about yourself and why you are studying.

Ask what study they have previously done, including with us (for example, ARC or OPEN). If they have not previously certified with us (CPO/P/M/D), advise they will automatically be admitted as a CPO upon completing this program. Higher level certification may also be of interest to them, if eligible by virtue of their experience.

Continue the conversation here to elicit the personal and professional benefits they expect from the course, prompting them if needed. Encourage them to document these goals, as they can be used to inspire motivation when studying (or finding the time to study) gets hard.

- Student motivations should be noted and passed on to admin

Explain the course

Have the student share their screen and introduce them to the study program

- Login – show them how to change their password if logging in for the first time
- My courses – show them the course(s) they are enrolled in
- OPEN
    - **OPEN** is the theory component of the course.
    - The 12 units in OPEN (and their quizzes) must be completed before attempting the BSB50820 units. This is because you will need a strong foundational knowledge of all aspects of project management before attempting the assessment tasks in the units
    - Show them how to complete topics and 'open-book' quizzes. Introduce Order of Merit and how to achieve it.
- BSB50820 Diploma of Project Practice
    - There a 12 AQF units in this qualification. Each unit has the following:
        - **Performance tasks** require you to complete a series of documents typical to projects. If you already have workplace documents of the type specified, you can submit them, or use the templates provided.
        - **Knowledge questions** are short answer questions that need to be answered in writing in 200-500 words each. There are no more than five knowledge questions per unit, and you are encouraged to refer to OPEN and use ChatGPT or Google Bard to help draft and proof your answers
        - **Reflections** are a 15-minute interview with a mentor to share your relevant experience. There are no more than three guiding questions per reflection. The final reflection is your Certification assessment.
- Assessment guide – details the course requirements (this is especially useful as they cannot look ahead until they complete each task/unit)

Plan progress

- Most students should expect to complete an OPEN unit weekly in 2-3 hours of study.
    - Students MUST finish OPEN before attempting the BSB50820 assessment tasks
- Diploma assessment tasks should take 2-3 weeks each, including interview questions, although the Review may take a little longer.
- Interviews are a great opportunity to ask questions and get feedback on the performance tasks.
- The following plan is recommended and requires a commitment of 2-3 hours per week.
- Students under a training contract (with their employer and a funding body) are required to sign off on their study plan with their employer.

Due date	*Unit outcomes*
Weeks 1-12	OPEN Units 1-12
Weeks 13-14	BSBPMG530 Manage project scope
Weeks 15-16	BSBPMG531 Manage project time
Weeks 17-18	BSBPMG533 Manage project cost
Weeks 19-20	BSBPMG538 Manage project stakeholder engagement
Weeks 21-22	BSBPMG534 Manage project human resources
Weeks 23-24	BSBTWK503 Manage meetings
Weeks 25-26	BSBPMG535 Manage project information and communication
Weeks 27-28	BSBPMG537 Manage project procurement
Weeks 29-30	BSBPMG536 Manage project risk
Weeks 31-32	BSBPMG532 Manage project quality
Weeks 33-34	BSBPMG539 Manage project governance
Weeks 35-40	BSBPMG540 Manage project integration

- You should discourage students from setting targets that are more aggressive than this. Rather, encourage them to finish ahead of this schedule!
- Some students may also feel that these targets are a bit tight. However, don't let them push out targets too far, as momentum is an important predictor of successful completion.

- Admin must be notified if students wish to vary this plan

Identify risks

Students should self-identify risks to completing their course. You can prompt them with the following known risks (and potential responses) include:

- Lack of self-discipline – set a detailed study plan with dedicated weekly hours and hold yourself accountable.
- Limited social interaction – use the interviews to chat about the course and your projects; discuss your learnings with family, friends and colleagues.
- Technical issues – get comfortable and confident with MS Office and the online learning portal – assistance can be provided if needed.
- Overwhelming amount of information – attack the course the way it is structured, in bite-sized chunks. Apply learnings in your projects in life when as you go.
- Distractions at home – create a dedicated study space and make it off-limits to others during study times. Hide your phone!
- Life events – schedule study pauses when major life events are on (for example, weddings, births, holidays, bereavement).
- Motivation – remember why you are doing this – what are the outcomes driving you?

Identify supports

A range of supports are available for students who self-identify with special needs. These range from LLN and digital literacy support to professional psycho-social support.

- Negotiated changes to their study plan that better reflect a realistic likelihood of completion
- One-on-one mentor sessions over Zoom to assist with difficult learning content or assessment tasks
- Re-inclusion of employers in setting study times and access to workplace projects (not applicable to Transition Fund students)
- Sharing additional resources around self-paced learning, study time management and other motivational barriers students may be encountering. These resources are custom sourced by our support team in response to specific student need.
- An invitation to pause study during significant, temporary life events. Examples include wedding planning, long holidays, birth of a child, accident, illness or bereavement.
- Warm, facilitated introduction to community support / care services
- Notify admin of any special supports or needs
- IMPORTANT! If you believe the student has an LLN or digital literacy issues that will be a barrier to them studying, notify admin urgently

Use of artificial intelligence

Introduce the student handbook, particularly discussing the AI policy for both students and assessors: https://link.edu.au/handbook/

Wish them luck!

A student support champion will contact all students next to check in on their progress.

Note: Students attending an ARC workshop do not need a kick-off meeting; however, they will require one before attempting the BSB50820 assessment tasks, even if they are co-enrolled.

BSBPMG530 Manage project scope

Performance tasks

T1 Prepare a charter for a professional or personal project.

Essential requirements:

All fields must be sufficiently detailed.

T2 Using Gantt charting or similar software, prepare a work breakdown structure (WBS) and schedule for a professional or personal project.

Essential requirements:

At a minimum, it must include at least 15 linked and resource-allocated tasks over two (2) hierarchy levels, with clear dependencies and a critical path.

Knowledge questions

Q1 How do you include stakeholders to establish a shared understanding of intended outcomes and the high-level scope, time and cost constraints of a project?

Model answer:

Involving stakeholders in the early stages of a project is crucial for setting clear expectations, fostering buy-in, and establishing a shared understanding of project goals, scope, timeframes, and cost constraints. Here are some strategies you can use to include stakeholders effectively:

1. Identify your stakeholders: The first step is to identify who your stakeholders are. This could include anyone who has a vested interest in the project. It may be clients, customers, team members, managers, suppliers, or other parties who will be impacted by the project's outcome.

2. Establish clear communication: Ensure there are open lines of communication with all stakeholders. Regular updates about the project's status, any changes in scope or timelines, and other important details should be shared. Use clear, concise language that all stakeholders will understand.

3. Hold kickoff meetings: A project kickoff meeting can be a good opportunity to establish a shared understanding of the project. In this meeting, you can explain the intended outcomes of the project, discuss high-level scope, and provide estimates on time and cost constraints.

4. Regularly consult with stakeholders: Engage stakeholders in regular consultations throughout the project. This can involve asking for their feedback or input on certain aspects of the project, discussing potential changes, and reviewing the project's progress against the initial outcomes, scope, and constraints.

5. Provide clear documentation: Documentation like a project charter, project plan, or project brief can help ensure everyone understands the project's intended outcomes and constraints. These documents should be made easily accessible to all stakeholders.

6. Use collaborative tools: Project management software and other collaborative tools can be a good way to keep stakeholders involved and informed. These tools can provide visibility into the project's progress and any changes in scope, timelines, or costs.

7. Stakeholder workshops and meetings: Regularly scheduled stakeholder meetings can be an excellent opportunity for stakeholders to express their needs, discuss potential risks, clarify expectations, and contribute to decision-making.

8. Manage expectations: Managing stakeholder expectations is crucial. Be clear about what the project can and cannot deliver and ensure that all stakeholders understand this. This will help prevent scope creep and misunderstandings later on.

9. Agree on a process for change management: Changes are inevitable in any project. Agreeing on a process for how changes will be managed and communicated from the outset can help prevent confusion and keep all stakeholders aligned.

Remember, the key to successful stakeholder involvement is open and ongoing communication. By keeping stakeholders informed and involved, you can help ensure that the project delivers its intended outcomes within the agreed-upon scope, time, and cost constraints.

Q2 What process should you follow, as a project manager, when preparing and seeking approval for a project?

Model answer:

Preparing and seeking approval for a project involves several key steps. As a project manager, you'd want to follow this general process:

1. Project Idea Generation: Projects often start with a business need or an idea to improve something. This idea might come from various sources including strategic objectives, operational needs, regulatory requirements, etc.

2. Preliminary Analysis: The next step is to conduct a preliminary analysis or a feasibility study to evaluate the idea's potential. This typically includes understanding the problem or opportunity, the expected benefits, the feasibility (technical, financial, operational), and preliminary estimates for time and cost.

3. Project Charter: If the preliminary analysis is positive, you'd draft a project charter. The charter provides a high-level overview of the project and includes the project's purpose, preliminary objectives, key stakeholders, a high-level project description, and resource requirements. It sets the direction and secures the commitment of the organization.

4. Business Case: Alongside or as part of the project charter, you should also prepare a business case. This document goes more in-depth into the benefits of the project, the costs involved, the expected return on investment, risks, and a cost-benefit analysis.

5. Seek Approval: After drafting the project charter and the business case, you should seek the approval of key stakeholders or the project governance board. The approval process may vary depending on your organization's structure and governance. It's essential to provide all the necessary information and to be prepared to answer any questions.

6. Project Planning: Once you have approval, you'll need to start the project planning phase. This includes creating a project management plan, which encompasses defining the project scope, developing a detailed work breakdown structure, creating a schedule, setting up communication and risk management plans, and so forth.

7. Final Approval and Kick-off: Even after detailed planning, a final approval may be required before the project can formally start. This is a checkpoint for stakeholders to review the detailed plan, budget, and other elements to ensure alignment with organizational goals. Once everything is approved, you can officially kick-off the project.

Remember, the specific details of the process can vary from organization to organization, but these general steps should help you prepare and seek approval for a project. It's critical to keep stakeholders informed and involved throughout the process to ensure alignment and buy-in.

Q3 How do you monitor performance against scope during project delivery?

Model answer:

Monitoring performance against scope during project delivery involves several key steps:

1. Project Management Plan: Before you start monitoring, it's essential to have a clear project management plan with well-defined scope. This plan will serve as a baseline against which you can measure performance.

2. Work Breakdown Structure (WBS): Create a WBS that breaks down the scope into smaller, manageable pieces of work. Each piece should be clearly defined, have an owner, and be associated with specific deliverables.

3. Scope Monitoring Tools: Utilize project management tools or software that allows you to track progress against the project's planned scope. These tools can provide a clear view of completed tasks, ongoing tasks, and tasks that are yet to be started.

4. Regular Status Meetings: Hold regular status meetings with your project team and stakeholders. In these meetings, discuss the progress of the project, any deviations from the planned scope, and how these deviations will be managed.

5. Scope Change Management: Have a clear scope change management process in place. Any changes to the project scope should be documented, assessed for impact (on time, cost, quality, risks), approved by the relevant authorities, and communicated to all stakeholders.

6. Progress Reporting: Regularly report on the progress of the project. This should include updates on the scope, such as what part of the work has been completed and whether the project is on track to deliver all the scope within the agreed timelines.

7. Performance Dashboards: Use dashboards to visually display the project's status. Key performance indicators (KPIs) related to scope, such as scope variance, scope creep, or percentage of completed work, can be used to track performance.

8. Reviews and Audits: Conduct periodic reviews or audits to ensure the work being done aligns with the scope. This could involve reviewing the quality of the deliverables, assessing whether the work meets the requirements, and checking if the project is still aligned with its original objectives.

9. Lessons Learned: Keep track of any issues or challenges encountered during the project, and how they were resolved. These "lessons learned" can be valuable for managing scope in future projects.

Remember, the key to effective scope management is regular monitoring and communication. By keeping a close eye on the project scope and regularly updating stakeholders, you can help ensure that the project stays on track and meets its objectives.

Q4 How should you manage changes to the scope of tasks within the project plan?

Model answer:

Managing changes to the scope of tasks within the project plan is an essential part of project management, as scope creep can derail a project's timeline and budget. Here are the steps to manage scope changes effectively:

1. Establish a Change Management Process: This process should be defined at the beginning of the project, included in the project management plan, and communicated to all stakeholders. It should outline how potential changes will be identified, reviewed, approved, or rejected.

2. Identify Potential Changes: Changes can come from various sources: stakeholders, project team members, external events, etc. It's important to create a culture where potential changes can be freely discussed and documented, and not instantly implemented without analysis.

3. Analyze the Impact: If a potential change is identified, the next step is to analyze the impact of this change on the project's objectives, timeline, costs, risks, and quality. It's crucial to understand the consequences of the change before deciding whether to implement it.

4. Review the Change Request: Review the potential change and its impact analysis with the project team and key stakeholders. This should involve discussing the pros and cons of the change, and how it aligns with the project's objectives.

5. Approve or Reject the Change: The decision to approve or reject the change will typically be made by a designated authority, such as a project manager or a change control board, based on the project's governance structure. The decision should be based on the impact analysis and the alignment with the project's goals.

6. Update the Project Plan: If the change is approved, the project plan needs to be updated accordingly. This might involve revising the work breakdown structure, schedule, budget, risk register, and other relevant documents. All changes and their impacts should be documented in a change log.

7. Communicate the Change: Communication is a crucial part of change management. Any changes to the project's scope should be clearly communicated to all relevant stakeholders. This includes not only what the change is, but also why it was made and how it impacts the project.

8. Monitor and Control: Finally, after the change is implemented, it's important to continue monitoring and controlling the project to ensure it stays on track. This involves comparing the project's progress with the revised project plan and managing any new risks or issues that arise.

Remember, not all changes are negative. Some changes might bring significant benefits to the project or are necessary to adapt to new circumstances. The key is to manage them effectively to ensure they contribute positively to the project's outcomes.

Q5 How might you identify and document scope management issues over the life of a project and make recommendations for future projects?

Model answer:

Identifying and documenting scope management issues throughout the life of a project can provide valuable insights and lessons learned for future projects. Here's a general process you could follow:

1. Ongoing Monitoring: Regularly monitor the project's progress and actively look for any signs of scope creep, uncontrolled changes, or deviation from the project plan. This could involve regular team meetings, progress reports, and direct communication with team members and stakeholders.

2. Document Issues: When a scope-related issue is identified, it should be documented immediately. This could be done in a project issue log or a similar tool, where details about the issue, its impact, and the proposed solution can be recorded.

3. Resolve and Learn: Take steps to address the issue and prevent it from escalating. This could involve revisiting the project plan, realigning expectations with stakeholders, or adjusting the project's resources. Record the resolution in the issue log, along with any lessons learned in the process.

4. Post-Project Review: At the end of the project, conduct a thorough review of the scope management process. This should involve revisiting the issue log and discussing the scope-related issues faced during the project. What caused these issues? Could they have been prevented? What could be done better next time?

5. Document Recommendations: Based on the lessons learned during the project and the post-project review, document recommendations for managing scope in future projects. This could involve improvements to the scope definition process, better change management procedures, more regular scope reviews, etc.

6. Share Insights: Share your findings and recommendations with relevant stakeholders, such as project team members, project managers, or the project management office (PMO). This could be done through a formal report, a presentation, or a knowledge sharing session.

7. Update Processes and Templates: Based on the recommendations, consider updating your organization's project management processes and templates to incorporate the lessons learned. This could help prevent similar scope issues from arising in future projects.

By proactively identifying, documenting, and learning from scope management issues, you can continuously improve your project management practices and increase the chances of success in future projects.

Reflection

Reflect on two or more projects you recently contributed to.	Project 1	Project 2
R1 Give a couple of examples of how you included stakeholders to plan the scope of a project. *Essential requirements:*		

Must be examples from at least two different projects. *Collaborate with stakeholders to produce a scope-management plan.*		
R2 Give an example of a time you needed to vary your project's scope? How do you go about it? *Essential requirements:* *Implement agreed scope management procedures and processes.* *Monitor impact of scope changes within established time, cost and quality constraints according to change control procedures.*		
R3 What scope management lessons have you learned from previous projects? **How will you ensure these lessons are carried forward to future projects?** *Essential requirements:* Must be examples from at least two different projects. *Review and document scope-management implementation and recommend improvements.*		

BSBPMG531 Manage project time

Performance tasks

T3 Update your Gantt chart from the previous activity with project progress at a given milestone. Indicate which tasks are ahead or behind schedule and separately describe the actions you need to take.

Essential requirements:

The Gantt chart must highlight progress against project tasks.

A brief report on schedule variations to the plan and actions required must be included.

Knowledge questions

Q6 How do you include stakeholders in the preparation of a schedule, communicating the baseline and the impacts of any subsequent change?

Model answer:

Stakeholder engagement is critical to the success of a project, and the project schedule is a key element of this. Here's how you might involve stakeholders in preparing the schedule, communicating the baseline, and discussing any subsequent changes:

1. Involvement in Schedule Preparation

Involve key stakeholders in the preparation of the schedule. This could include brainstorming sessions, meetings, or one-on-one discussions. Their inputs can be invaluable, especially if they have expertise in specific areas or have been involved in similar projects before. They can help identify potential issues or suggest efficiencies that may not have been previously considered.

2. Communicating the Baseline

Once the project schedule has been established, it is important to communicate this 'baseline' to all stakeholders. This gives everyone a clear understanding of what is expected, and when. It also sets the stage for measuring progress and managing changes.

- Share the schedule: Use visual aids such as Gantt charts or project management software, which can offer real-time views into the project schedule.

- Explain key milestones: Clearly outline what will be accomplished by when and highlight important dates or deliverables.

- Clarify responsibilities: Ensure that each stakeholder understands their role and responsibilities relative to the schedule.

3. Managing and Communicating Schedule Changes

Despite best efforts, project schedules often need to change. It's important to manage these changes effectively and communicate them promptly to all stakeholders.

- Change control process: Establish a change control process at the start of the project. This defines how changes to the schedule (or other parts of the project) are proposed, reviewed, approved (or rejected), and implemented.

- Regular updates: Provide regular updates on the project's progress. This could be through scheduled meetings, emails, or a project management dashboard.

- Transparent communication: If changes occur, communicate them as soon as possible. Explain the reason for the change, the impact on the schedule, and any adjustments that stakeholders will need to make.

Remember, effective stakeholder communication is about more than just transmitting information—it's about fostering a two-way dialogue. Encourage questions, feedback, and input from stakeholders throughout the project.

Q7 How do a project's changing resource requirements and risks impact its schedule?

Model answer:

A project's changing resource requirements and risks can significantly impact its schedule. Here is how:

Changing Resource Requirements

1. Availability of Resources: If a project suddenly requires more resources (either human resources or physical resources like materials or tools) than initially planned, and these are not readily available, it could lead to delays. Similarly, if key resources are pulled away from the project, it can also slow down progress.

2. Resource Learning Curve: If the project requires specialized resources or skills partway through the project that weren't initially identified, time will be needed to either hire new personnel with those skills or train existing personnel. This could also delay the project.

3. Resource Allocation and Reallocation: There may be instances when resources have to be reallocated from one task to another, which may cause delays in the task from which resources have been pulled.

Changing Risks

1. Identification of New Risks: If new risks are identified during the execution of a project, they need to be analyzed, and if necessary, mitigation strategies should be put in place. This process can lead to a revision in the project schedule.

2. Realization of Risks: If identified risks materialize, the resulting issues may cause delays in the project. For instance, if there's a risk of a key team member falling ill, and it happens, the project may be delayed while a replacement is sought.

3. Risk Response Time: The time required to implement risk response strategies could extend the project schedule. For example, changing suppliers to mitigate a risk may require additional time for the new supplier to deliver.

4. Unforeseen Risks: These are risks that were not identified or considered during the risk assessment phase. Their impact is often more significant because no preparation or mitigation was planned, which can lead to project delays.

These potential changes underline the importance of proper risk and resource management throughout the project lifecycle. It's crucial to remember that project management is not a set-it-and-forget-it process but requires ongoing adjustments and revisions. Using techniques

such as rolling wave planning and maintaining a risk register can help manage these changes effectively.

Q8 When monitoring a project's schedule, what are some of the key things you are looking for?

Model answer (must reference critical path):

When monitoring a project's schedule, you are looking to ensure that the project remains on track to complete its objectives within the defined timeline. Specifically, here are several key things to consider:

1. Project Milestones: Are key milestones being met on time? Milestones are significant events in your project that partition it into manageable stages. Tracking milestones helps you to understand if you're progressing at the right pace.

2. Task Completion: Are tasks being completed as scheduled? Check the status of each task, whether it's completed, in progress, or not started. If tasks are consistently taking longer than planned, the project is likely behind schedule.

3. Critical Path: Are there any delays on the critical path? The critical path comprises the series of tasks that directly impact the project's end date. Any delays in these tasks will delay the whole project.

4. Resource Allocation and Utilization: Are resources (people, equipment, etc.) being utilized effectively and as planned? Overutilized resources can lead to burnout and errors, while underutilized resources may indicate inefficiencies.

5. Dependency Management: Are dependencies between tasks being managed properly? If a dependent task is delayed, it can affect the tasks that follow, which can ultimately impact the project schedule.

6. Change Requests: Are there any change requests that could affect the project's schedule? These need to be assessed and managed carefully to minimize their impact on the timeline.

7. Risk and Issue Management: Are there any new risks or issues that could affect the schedule? These should be identified and mitigated as soon as possible.

8. Forecasting: Based on current progress, will future tasks be completed as planned? Forecasting can help identify potential problems before they occur.

9. Buffer Time: Is there enough buffer time in the schedule to accommodate any unexpected delays? Buffer time can be crucial to handle unforeseen circumstances.

Remember, regular communication with the project team and stakeholders is vital for effective schedule monitoring. Regularly updating and sharing the project schedule can help ensure that everyone is aware of the project's progress and any changes to the timeline.

Q9 What are resource-levelling, fast-tracking and crashing when it comes to managing a project's schedule? How might you apply them?

Model answer:

These terms refer to techniques used in project management to manage and adjust the project schedule. Here's what each one means:

1. Resource Leveling: Resource leveling is a technique in project management that involves adjusting the project schedule to balance the demand for limited resources. The main goal of resource leveling is to minimize the fluctuation of resource demand and to avoid over-allocation of resources. It might result in a longer project schedule, but it ensures resources are not overworked or underutilized.

Application: Suppose you have a project where a particular resource, say a team member with specific skills, is over-allocated (i.e., they are needed on multiple tasks that are scheduled at the same time). Using resource leveling, you might reschedule some of these tasks so that they occur sequentially rather than simultaneously, ensuring the team member's workload is evenly distributed over time.

2. Fast Tracking: Fast tracking is a technique used when a project is behind schedule. It involves performing activities or tasks that were initially planned to be done sequentially, in parallel or overlapping them. The risk here is that as more activities are performed in parallel, the complexity and communication needs can increase, potentially leading to more errors or rework.

Application: If your project is behind schedule, and there are tasks that are planned to be done one after another (sequentially), but they do not actually depend on each other, you can fast track by doing these tasks at the same time (in parallel) to save time.

3. Crashing: Crashing is another technique used to shorten the project schedule. It involves allocating more resources to the project to complete it faster. Crashing only works for activities where additional resources will shorten the schedule. It often results in increased cost.

Application: Suppose a particular task is scheduled to take four weeks based on one resource working on it. If you're behind schedule, you might decide to crash the project by assigning an additional resource to that task, potentially halving the time it takes to two weeks. However, the cost would increase because you're paying for an extra resource.

In summary, each of these techniques has a place in project management, but they should be used wisely. Resource leveling is primarily used for more effective resource management, while fast tracking and crashing are used to shorten the project schedule, usually with an increase in cost and/or risk.

Q10 How will accurately documenting schedule progress over the life of a project contribute to the process of project review?

Model answer:

Accurately documenting schedule progress throughout a project's life cycle is crucial to the project review process. Here are several reasons why:

1. Performance Analysis: By documenting progress, you can analyze the actual performance of the project against the planned schedule. This allows you to measure variance and understand if the project is ahead, on, or behind schedule, informing decisions on whether adjustments are needed.

2. Resource Utilization: Regular tracking of schedule progress also provides insights into resource utilization. You can see if resources are over-allocated or underutilized and make necessary adjustments.

3. Risk Management: Monitoring progress can help identify potential risks or issues that could impact the schedule. Early identification of risks allows for quicker mitigation and less impact on the project.

4. Stakeholder Communication: Regularly documented progress helps in maintaining transparency with stakeholders. This increases trust and enables stakeholders to make timely decisions based on current project status.

5. Lessons Learned: Detailed documentation of schedule progress can serve as a valuable resource for future projects. Understanding what went well and what didn't in terms of schedule management can provide lessons for more accurate scheduling in the future.

6. Scope Management: Monitoring schedule progress can help identify scope creep - where additional features or functions are added to the project without considering the impact on time or resources. Scope creep can derail a project and push it off schedule.

7. Change Management: Changes are inevitable in projects. Documenting schedule progress accurately helps in assessing the impact of change requests. If a project is already behind schedule, accepting more changes without adjustments might not be feasible.

In conclusion, proper documentation of schedule progress is a vital aspect of project management. It aids in control and decision-making during the project, facilitates communication with stakeholders, and contributes to continuous improvement in future projects.

Reflection

Reflect on two or more projects you recently contributed to.	Project 1	Project 2
R4 Describe in detail a schedule you prepared for a recent project. <u>*Essential requirements:*</u> *Develop a project schedule using project management tools and techniques.*	T 2	
R5 Give an example of a time you needed to vary your project's schedule? How do you go about it? <u>*Essential requirements:*</u> *Review progress throughout project life cycle and implement agreed schedule changes.* *Develop responses to potential or actual schedule changes and implement them to maintain project objectives.*		
R6 What time management lessons have you learned from previous projects?		

How will you ensure these lessons are carried forward to future projects? *<u>Essential requirements:</u>* Must be examples from at least two different projects. *Conduct a review of project scheduling and recommend improvements for the future.*		

BSBPMG533 Manage project cost

Performance tasks

T4 Prepare a task-level budget for a professional or personal project.

Essential requirements:

Labour and resources must be fully priced, even if they are notionally 'free'.

Ensure indirect costs are included.

The budget must be presented over time, as per a Gantt chart, with the timing and impact of cash flows considered.

Knowledge questions

Q11 How can you improve the quality of estimates in project planning?

Model answer:

Improving the quality of estimates in project planning often involves a multi-faceted approach. Here are some strategies you might consider:

1. Decompose Large Tasks: Break down larger tasks into smaller, more manageable ones. This makes the tasks easier to estimate because you are working with specifics rather than generalizations.

2. Use Historical Data: If similar projects have been completed in the past, use that data to guide your estimates. Past experience can be an excellent teacher, especially when it comes to time and cost projections.

3. Employ Estimation Techniques: Use formal estimation techniques, such as PERT (Program Evaluation Review Technique), which uses a weighted average of three numbers (most optimistic, most pessimistic, and most likely) to arrive at an estimate. Techniques like Delphi method, where multiple experts provide their estimates and then reconcile differences, can also be very effective.

4. Consider Risk and Uncertainty: Include buffers for risks and uncertainties in your estimate. Not every aspect of a project goes as planned, so it's crucial to account for potential delays or unforeseen costs.

5. Involve the Team: Involve the team members who will be doing the work in the estimation process. They have the best understanding of what is required to complete their tasks and can provide the most accurate estimates.

6. Continual Re-estimation: As the project progresses, continually revise and refine your estimates based on what you've learned. This practice, often referred to as rolling wave planning, is especially useful in long or complex projects.

7. Use Estimation Software: There are many project management software tools that can assist with estimates. These tools use algorithms and historical data to help provide more accurate projections.

8. Training and Experience: More accurate estimates often come from project managers who have extensive experience and have received training in estimation techniques.

By using these techniques, it's possible to improve the quality of estimates in project planning, leading to more successful projects.

Q12 How should you track a project's performance against its budget?

Model answer:

Tracking a project's performance against its budget is critical to ensure the project stays financially healthy and to identify any potential issues as early as possible. Here are some steps you can take:

1. Establish a Baseline Budget: At the beginning of the project, establish a baseline budget that clearly outlines expected costs for each aspect of the project. This will serve as your point of reference against which actual costs will be compared.

2. Implement a Project Accounting System: Use a project accounting or project management system to record all project expenses as they occur. This should include labor costs, materials, outsourced services, and any other costs associated with the project. It should be updated regularly to provide real-time financial data.

3. Regularly Monitor and Report: On a regular basis (weekly, bi-weekly, or monthly depending on your project), compare the actual costs incurred to the baseline budget. This will allow you to track the project's financial performance and identify any variances.

4. Calculate Variance: Variance is the difference between the planned cost and the actual cost. If you are over budget, you'll have a positive variance; if you are under budget, it will be negative. This can help you understand whether you're staying within your budget boundaries.

5. Earned Value Management (EVM): EVM is a project management technique for measuring project performance and progress in an objective manner. It has the ability to combine measurements of scope, schedule, and costs. Key EVM metrics include Cost Performance Index (CPI) and Schedule Performance Index (SPI). A CPI less than 1.0 indicates that the project is over budget, while a CPI greater than 1.0 indicates that the project is under budget.

6. Forecasting: Based on the current spending rate and any identified variances, forecast future spending to completion. This will help you anticipate whether the project will likely go over budget before it happens.

7. Regular Reviews: Conduct regular financial review meetings with key stakeholders to discuss the project's financial performance. This provides an opportunity to discuss any issues and make decisions to correct any deviations from the budget.

Remember, it's essential to have a well-established process for tracking and managing project costs, and a key part of that is regular monitoring and review. Effective cost management contributes to successful project outcomes.

Q13 What should you do if your project looks like it will over-spend its budget?

Model answer:

If a project appears to be heading towards overspending its budget, there are several strategies and steps you can take to bring it back on track:

1. Review and Analyze: First, thoroughly review the budget and all costs to date to understand where the overages are occurring. Are they in labor, materials, equipment, or another area? Understanding the nature of the overspend is critical to resolving the issue.

2. Forecast: Based on the current rate of spending, project how much over budget the project will be if nothing changes. This gives you an idea of the scale of the problem.

3. Identify Root Causes: Try to identify the root cause(s) of the cost overrun. Was the original estimate too low? Have there been unexpected costs? Has there been a change in project scope? Have there been delays that have increased costs? Understanding why the project is over budget will help in finding the right solutions.

4. Develop a Plan: Depending on the root cause, develop a plan to address the overspend. This could involve finding areas where costs can be reduced, determining if there are ways to work more efficiently, or if necessary, negotiating changes in scope or deliverables.

5. Communicate with Stakeholders: Once you have a plan, communicate the situation and proposed solutions with stakeholders. This includes the project team, sponsor, and any other key stakeholders. They should be kept informed of budgetary issues, as it may impact them directly and they may also have useful ideas or solutions.

6. Implement the Plan: Implement the cost-saving measures that have been agreed upon. Monitor their effectiveness closely and be prepared to adjust your plan if necessary.

7. Increase the Budget: In some cases, the only feasible solution may be to request additional funds. If you choose this route, be prepared with solid justifications and a clear plan for how the extra funds will be used.

Remember, it's important to detect and address budget overruns as early as possible. Regular budget monitoring and control is a crucial part of project management.

Q14 What should you do if your project looks like it will under-spend its budget?

Model answer:

If your project looks like it will under-spend its budget, that might initially seem like a good thing – and it can be. However, it's important to consider a few factors and steps:

1. Validate Cost Reporting: Verify that all costs have been reported correctly and that nothing significant has been overlooked. This includes direct costs such as materials and labor, but also indirect costs like overhead.

2. Review the Project's Progress and Quality: Ensure that the project is on track to deliver the expected outputs and that quality is not being compromised. It's possible that under-spending is a result of corners being cut, which could lead to problems down the line.

3. Check the Scope: Ensure that all planned activities are being conducted and that the project scope is being fully delivered. It’s possible that under-spending is occurring because certain activities have been missed or delayed.

4. Assess Future Risks and Costs: There may be upcoming risks or potential costs that have not yet materialized. Ensure these are well assessed and budget is allocated for contingencies.

5. Reallocation of Resources: If, after careful examination, you find that the project is indeed on track to under-spend, you may be able to reallocate surplus budget to other areas of the project that could benefit from extra funds. This could include activities such as additional quality assurance measures, training, or even an enhancement to the project deliverables, provided it doesn't result in scope creep.

6. Return the Savings: If the project can be completed under budget without compromising on quality or scope, the remaining funds could be returned to the organization or client, or possibly allocated to other projects in need.

7. Communicate with Stakeholders: Whether you're reallocating funds or returning them, it's important to communicate these actions with your stakeholders. Transparency is key in maintaining trust and managing expectations.

It's worth noting that while coming in under budget can reflect efficient project management, it could also indicate that the project was overestimated initially. This could be a learning opportunity for improving cost estimation processes in the future.

Q15 How should you finalise (close) a project's budget and costs?

Model answer:

Finalizing or closing a project's budget and costs involves several steps to ensure that all financial obligations have been met and to prepare for the next project. Here's what you should do:

1. Ensure All Costs Are Accounted For: Review all project activities and confirm that all costs have been accurately recorded. This includes direct costs such as labor, materials, and equipment, as well as indirect costs like administrative expenses and overheads.

2. Verify All Invoices Have Been Paid: Check all invoices related to the project and confirm that they have been paid. This includes invoices from vendors, contractors, or any other third parties involved in the project.

3. Final Financial Report: Prepare a final financial report that details the total costs of the project and compares these with the original budget. The report should highlight areas where the project was over or under budget and provide explanations for these variances.

4. Project Audit: Perform a project audit to ensure all financial transactions have been conducted and recorded correctly. This can help detect any errors or inconsistencies and confirm the accuracy of the final financial report.

5. Lessons Learned: As part of your project's closure, conduct a "lessons learned" session focused on the project's financial management. What estimation techniques worked well? Where did the project go over budget, and why? This can provide valuable insights for future projects.

6. Return Unspent Funds: If there are unspent funds at the end of the project, arrange for these to be returned to the funding source, whether that's an internal department within your organization or an external client. Ensure this process is done transparently and is properly documented.

7. Stakeholder Communication: Communicate the project's final financial status to all relevant stakeholders. This keeps everyone informed and helps to build trust for future projects.

8. Close Accounts: Finally, close out any financial accounts related to the project. This could include bank accounts, credit cards, or vendor accounts. Ensure that this process is done in accordance with your organization's financial policies and procedures.

Remember, closing out a project's budget and costs isn't just about tying up loose ends. It's also an opportunity to reflect on the project's financial management and learn from the experience to improve future projects.

Reflection

Reflect on two or more projects you recently contributed to.	Project 1	Project 2
R7 How do you monitor income and expenditure against your project's budget? *Essential requirements:* Process must have been applied to at least two different projects. *Monitor costs across a project's life cycle including solving cost variations and analysing possible alternatives.* *Record expenditure, create accurate financial reports and review cost-management processes.*		
R8 Give examples of a couple of times you needed to vary your project's budget? How do you go about it? *Essential requirements:* Must be examples from at least two different projects. *Monitor costs across a project's life cycle including solving cost variations and analysing possible alternatives.* *Record expenditure, create accurate financial reports and review cost-management processes.*		
R9 What cost and budget management lessons have you learned from previous projects? **How will you ensure these lessons are carried forward to future projects?** *Essential requirements:*		

Must be examples from at least two different projects. *Record expenditure, create accurate financial reports and review cost-management processes.*		

BSBPMG538 Manage project stakeholder engagement

Performance tasks

T5 Prepare a stakeholder register and engagement plan for a professional or personal project.

Essential requirements:

A broad mix of stakeholder categories, preferences and engagement techniques.

At least one stakeholder in a governance role

A minimum of five entries.

Engagement strategy (for a minimum of three (3) tasks or milestones) per stakeholder

Knowledge questions

Q16 How might you align the interests and expectations of project team members to their roles and responsibilities? How will you hold them accountable for the same?

Model answer:

Aligning the interests and expectations of project team members with their roles and responsibilities, and holding them accountable, is crucial to the success of any project. Here are some strategies:

1. Clear Communication of Roles and Responsibilities: Begin by clearly defining and communicating each team member's role and responsibilities. This can be done through a project charter, a team meeting, or individual discussions. Make sure everyone understands not only their tasks but also how their work contributes to the overall project goals.

2. Match Skills and Interests to Tasks: Whenever possible, assign tasks based on team members' skills, interests, and career goals. People tend to be more engaged and perform better when they are working on tasks that they find interesting and that align with their professional development goals.

3. Develop a Responsibility Assignment Matrix (RAM): A RAM, such as a RACI chart (Responsible, Accountable, Consulted, Informed), can be used to clearly define the role of each team member in relation to each task or deliverable. This can be a very effective tool for aligning expectations and responsibilities.

4. Set Clear Expectations: Clearly communicate expectations regarding work quality, deadlines, communication, and other aspects of the project. Make sure everyone understands these expectations and agrees to them.

5. Regular Feedback and Reviews: Provide regular feedback on team members' performance, and conduct periodic reviews. This can help keep everyone accountable and allow you to address any issues or concerns promptly.

6. Use Project Management Tools: Project management software can help track tasks, deadlines, and progress, making it easier for everyone to stay accountable. Make sure to choose a tool that suits your team's needs and preferences.

7. Establish a Performance Management System: This might include goal setting, regular performance reviews, and consequences for consistently poor performance. Make sure the system is fair, transparent, and consistently applied.

8. Encourage Ownership: Encourage team members to take ownership of their tasks. This can be achieved by giving them autonomy in their work, recognizing their achievements, and supporting their professional development.

9. Open and Regular Communication: Encourage regular and open communication within the team. This can help resolve issues, clarify expectations, and maintain a focus on the project goals.

By employing these strategies, you can ensure that your team members understand their roles, feel engaged and motivated, and are held accountable for their responsibilities in the project.

Q17 How and where could you capture and record the progress, insights and experiences of project team members?

Model answer:

Capturing and recording the progress, insights, and experiences of project team members is important for monitoring the project's status, managing risks, and learning from the project. Here are some ways and places where you could capture and record these details:

1. Project Management Software: Many project management tools, such as Jira, Asana, Trello, or Microsoft Project, allow team members to update their task status, comment on tasks, and share files. This can be a central place to record progress and insights.

2. Meeting Minutes: During regular project meetings, insights and experiences can be shared. It's important to take detailed minutes of these meetings and store them in a shared location accessible to all team members.

3. Project Logs: These include risk logs, issue logs, decision logs, and change logs. They can be used to record issues that come up during the project, decisions made, changes in the project, and how risks are being managed.

4. Shared Document Platforms: Platforms like Google Drive or Microsoft SharePoint can be used to create and store documents where team members can record their insights and experiences. This could be in the form of project reports, reflective documents, or individual learning logs.

5. Surveys and Feedback Forms: These can be used to collect feedback from team members about their experiences on the project. This could include what went well, what didn't, and what could be improved for future projects.

6. Post-Project Reviews or Lessons Learned Meetings: These are typically held at the end of the project, but could also be conducted at the end of project phases. In these meetings, team members discuss their experiences, what they learned, and what could be done better next time. The outcomes of these meetings should be documented and stored in a location accessible to the team.

7. Knowledge Management Systems: If your organization has a knowledge management system, this could be used to capture and share learnings from the project. This can help future projects learn from past experiences.

8. Project Status Reports: Regular project status reports can include updates on progress, issues, risks, and any insights gained.

By capturing and recording the progress, insights, and experiences of project team members, you can not only manage the current project more effectively but also learn valuable lessons for future projects.

Q18 How can you support your project team to better engage with project stakeholders?

Model answer (must include reference to interpersonal skills development):

Stakeholder engagement is a crucial part of project management. Your team's ability to work effectively with stakeholders can greatly influence the success of your project. Here are a few ways you can support your team to better engage with project stakeholders:

1. Clarify Stakeholder Roles and Expectations: Ensure your team understands who the stakeholders are, their interests, their influence over the project, and their expectations. This can be achieved through stakeholder mapping and analysis.

2. Effective Communication: Communication is key to stakeholder engagement. Develop a communication plan that outlines what information needs to be shared, how often, and through what channels. Train your team in effective communication skills, including active listening and clear, concise, and respectful communication.

3. Build Stakeholder Relationships: Encourage your team members to build relationships with stakeholders. This could be through regular meetings, collaborative work, or informal interactions. Strong relationships can lead to more effective engagement.

4. Empower the Team: Empower your team members to make decisions and represent the project in their interactions with stakeholders. This can give them the confidence to engage effectively with stakeholders.

5. Involve Stakeholders: Where appropriate, involve stakeholders in team meetings, decision-making processes, or project activities. This can give your team direct experience in engaging with stakeholders and can also increase stakeholder buy-in.

6. Provide Training and Support: If your team lacks experience in stakeholder engagement, consider providing training or coaching. This could include training on stakeholder management techniques, negotiation, or conflict resolution.

7. Roleplay and Scenario Planning: To help your team prepare for stakeholder interactions, consider roleplaying exercises or scenario planning. This can help them anticipate stakeholder reactions and prepare their responses.

8. Feedback and Continuous Improvement: Encourage feedback from both your team and stakeholders on how the engagement is working, and make adjustments as necessary.

By supporting your team in these ways, you can help them to engage more effectively with stakeholders, leading to better project outcomes.

Q19 How will you know if you are effectively engaging with stakeholders in support of a project's objectives? What can you do if things are going wrong?

Model answer:

Knowing whether you're effectively engaging with stakeholders can be determined through various indicators:

1. Feedback from Stakeholders: Regular feedback from stakeholders is a good way to gauge if your engagement efforts are effective. Are stakeholders expressing satisfaction with the project's progress and their involvement? If they express dissatisfaction, it may indicate a need to adjust your approach.

2. Stakeholder Participation: Effective engagement usually results in active stakeholder participation. If stakeholders are participating in meetings, providing valuable input, and responding to communications, it's a good sign that engagement is going well.

3. Project Progress: If your project is progressing smoothly towards its objectives without unexpected roadblocks or resistance, this is often a positive sign of effective stakeholder engagement.

4. Alignment of Expectations: Are stakeholders' expectations aligned with the project's objectives and progress? Misalignment could indicate a lack of effective communication or engagement.

If things are not going well, here are steps you can take:

1. Identify the Issue: First, try to identify the specific issues. Are stakeholders not responding to communications? Are they expressing dissatisfaction or confusion about the project's direction? Understanding the problems is the first step towards addressing them.

2. Increase Communication: It may be that stakeholders are not being kept sufficiently informed about the project's progress, which can lead to confusion or apathy. Increase the frequency or detail of your communication, or consider using different communication methods that might be more effective.

3. Revisit Expectations: If stakeholders' expectations are not aligned with the project's progress, it might be time to revisit these expectations. Make sure that the project's objectives, timeline, and deliverables are clearly communicated and understood by all stakeholders.

4. Personal Engagement: If certain stakeholders are not effectively engaged, consider meeting with them personally to understand their concerns or issues. Personal engagement can often be more effective than mass communications.

5. Seek Feedback and Adjust Strategy: Actively seek feedback from stakeholders on how the engagement process can be improved, and be open to adjusting your strategy based on this feedback.

Remember, stakeholder engagement is not a one-size-fits-all process. It requires continuous effort, monitoring, and adjustment to ensure it's effective and supports the project's objectives.

Q20 How can you continually improve your stakeholder engagement, from project to project?

Model answer:

Stakeholder engagement is a critical aspect of successful project management. Here are several strategies to continually improve your stakeholder engagement from project to project:

1. Lessons Learned: At the end of each project, conduct a 'lessons learned' session with your team. What worked well? What didn't? Where were there gaps in your stakeholder engagement strategy? Understanding the successes and failures of your past projects can provide a solid foundation for improvement.

2. Stakeholder Feedback: Actively seek and encourage feedback from stakeholders. Understanding their perspectives can provide valuable insights into your engagement efforts. You might use surveys, interviews, or informal conversations to collect this feedback.

3. Benchmarking: Look at how other organizations or projects are managing their stakeholder engagement. Are there strategies or tools they're using that you could adopt?

4. Training and Development: Invest in training for you and your team to develop skills in stakeholder engagement, communication, conflict resolution, and negotiation.

5. Stakeholder Analysis: Regularly conduct stakeholder analysis. By understanding who your stakeholders are, what their interests and concerns are, and how they prefer to be communicated with, you can tailor your engagement strategy to be more effective.

6. Improve Communication: Effective communication is key to stakeholder engagement. Look for ways to improve the clarity, frequency, and methods of your communication.

7. Continually Review and Adapt: Stakeholder engagement isn't static. Stakeholders, their interests, and their influences can change over time. Continually review and adapt your engagement strategy to reflect these changes.

8. Use Technology: Consider using project management software or other technology to streamline communication, share information, and manage stakeholder engagement more efficiently.

9. Establish Clear Goals and Expectations: Make sure stakeholders understand the project's goals, their role in the project, and what is expected of them. Clear expectations can prevent misunderstandings and conflicts.

10. Empathy and Understanding: Ultimately, effective stakeholder engagement is about relationships. Strive to understand your stakeholders' perspectives and needs, and demonstrate empathy in your interactions with them.

By continually seeking to improve your stakeholder engagement strategy, you can build stronger relationships with stakeholders, improve your project outcomes, and enhance your reputation as a project manager.

Reflection

Reflect on two or more projects you recently contributed to.	Project 1	Project 2

R10 Describe in detail how you designed and delivered a plan to properly engage stakeholders in a recent project. *<u>Essential requirements:</u>* *Develop and implement stakeholder engagement for a project.*	T 5	
R11 What are the different communication media and techniques you use when engaging with stakeholders? *<u>Essential requirements:</u>* Must be examples from at least two different projects. *Implement a range of appropriate stakeholder communication mechanisms.*		
R12 Give an example from a project where you got team leadership right. Give an example from a different project where you got it wrong! *<u>Essential requirements:</u>* Must be examples from at least two different projects. Challenge them on why they got it right or wrong. *Demonstrate team leadership for project team and stakeholders.*		

BSBPMG534 Manage project human resources

Performance tasks

T6 Prepare a position description for a project team member.

Essential requirements:

All fields must be sufficiently detailed.

Knowledge questions

Q21 How should you manage an under-performing project team member?

Model answer:

Managing an underperforming team member can be a challenging part of a project manager's role, but it's crucial to address the issue to maintain team productivity and morale. Here are some steps you can take:

1. Identify the Issue: Before taking any action, it's essential to understand the root cause of the underperformance. Is it due to a lack of skills, poor understanding of tasks, personal problems, demotivation, or something else? Review their work, observe their behavior, and use performance metrics to help identify the problem.

2. Provide Clear, Constructive Feedback: Arrange a private, one-on-one meeting with the individual to discuss your observations. Be specific about what you've noticed and why it's a concern. Use factual information and avoid personal criticisms. Make sure to also listen to their perspective.

3. Create a Performance Improvement Plan (PIP): If performance doesn't improve after feedback, a more formal approach may be required. A PIP outlines specific performance expectations, what the individual needs to do to improve, resources or support available to them, and a timeline for improvement.

4. Offer Support and Resources: The underperformance may be due to a lack of training or resources. Ensure the team member has the necessary tools and training to do their job effectively. If personal issues are affecting their performance, consider providing resources such as an Employee Assistance Program (EAP) if available.

5. Monitor Progress: Regularly monitor and review the individual's progress against the PIP. This could involve weekly check-ins or progress meetings.

6. Recognize Improvement: If the individual's performance improves, acknowledge their efforts. This can motivate them to continue doing well.

7. Escalate if Necessary: If the underperformance continues despite your efforts, you may need to involve Human Resources or the individual's line manager. They can provide advice on the next steps, which may involve disciplinary action or, in some cases, termination.

Remember, it's essential to handle the situation professionally and empathetically, ensuring the team member feels supported throughout the process. Ignoring underperformance can negatively affect the whole team and project, so it's important to address it promptly.

Q22 Two team members are in a disruptive conflict over shared project resources. How should you manage this?

Model answer:

When conflicts arise within a project team, it's essential to address them promptly and professionally to avoid negatively impacting the project. Here's how you might manage a conflict over shared project resources:

1. Understand the Conflict: Start by understanding the nature of the conflict. Meet with each team member individually to hear their side of the story. What is the resource they are fighting over? Why do they need it? Understanding the core issues will help in finding a resolution.

2. Facilitate a Discussion: Arrange a meeting with the two team members involved in the conflict. Let each person share their perspective and needs without interruption. Foster an environment of respect and open communication. Ensure that the focus remains on the issue, not on personal criticisms.

3. Identify Possible Solutions: After understanding the root of the conflict, work together to identify possible solutions. This could involve finding additional resources, adjusting the project schedule, or changing the way resources are allocated.

4. Negotiate a Resolution: Once the possible solutions have been identified, negotiate a resolution that satisfies both parties. This might require each team member to compromise, but the goal is to find a solution that allows the project to move forward effectively.

5. Communicate the Decision: Once a resolution has been agreed upon, communicate this to the wider team to avoid any misunderstandings or further conflicts. However, avoid sharing unnecessary details that might fuel gossip or create division within the team.

6. Monitor and Follow Up: After the conflict has been resolved, monitor the situation to ensure the resolution is being adhered to and that the conflict does not reignite.

7. Review and Learn: Once the situation is under control, review how the conflict was managed. What could have been done differently? What can be learned for the future? This could lead to changes in how resources are managed or how conflicts are resolved within the team.

Remember, conflicts are not always negative; they can lead to improved processes and better understanding among team members if managed effectively. Also, it's essential to maintain an atmosphere of respect and professionalism throughout the conflict resolution process.

Q23 How can you recognise and reward good performance by an individual or project team?

Model answer (must include reference to interpersonal skills development):

Recognizing and rewarding good performance is essential for maintaining team morale, motivation, and productivity. There are various ways to recognize and reward individual and team performance:

1. Public Recognition: This is one of the simplest and most effective ways to recognize good performance. Acknowledge the individual or team's accomplishments in a team meeting, an email, or on a recognition board. It's important to be specific about what they did well.

2. Private Recognition: Not everyone is comfortable with public praise, so consider recognizing their work privately through a one-on-one meeting or a personal note.

3. Awards: Consider setting up a system of awards for excellent performance. This could be "Employee of the Month", "Best Team Player", or "Project Superstar", for example.

4. Additional Responsibilities: If an individual consistently performs well, they might be ready for additional responsibilities. This could be a leadership role in the current project or a significant role in the next project.

5. Professional Development Opportunities: Reward good performance by supporting individuals' professional development. This could be through training, conferences, mentorship programs, or opportunities to work on special projects.

6. Flexible Work Arrangements: As a reward for good performance, you might consider offering more flexible work arrangements, such as remote work or flexible hours.

7. Bonuses or Pay Raises: If it's within your power and the company's budget, monetary rewards like bonuses or pay raises can be powerful motivators.

8. Small Gifts or Treats: Small gifts like gift cards, a special lunch, or treats for the team can be a nice way to recognize good performance.

9. Time Off: Extra time off or "early finish Fridays" could be used as a reward for outstanding performance.

10. Personalized Praise: Tailor your recognition to the individual. For some people, a personal note of thanks may be more meaningful than a public announcement. For others, an opportunity to present their work to senior management might be the ultimate compliment.

Remember, recognition and rewards should be tied to specific accomplishments or behaviors that align with the project's or organization's goals. This encourages more of those behaviors and helps to create a culture of recognition and appreciation within your team.

Q24 What are some good practices when it comes to disbanding the team at the end of a project?

Model answer:

Disbanding a project team at the end of a project should be done with care, as it's an opportunity to reflect on achievements, learn from the project, and celebrate the team's success. Here are some good practices when it comes to disbanding the team:

1. Project Review/Lessons Learned: Conduct a project review or a lessons learned meeting where the team can discuss what went well, what didn't, and what could be improved for future projects. This is a valuable learning opportunity and can help to improve processes and practices for future projects.

2. Celebrate Success: Celebrate the successful completion of the project. This could be a team lunch, a party, or a simple thank you note. Recognizing the team's hard work and achievements can boost morale and build a positive team culture.

3. Individual Feedback: Provide individual feedback to each team member about their performance during the project. This is an opportunity to acknowledge their contributions and discuss areas for improvement.

4. Documentation: Make sure all project documentation is completed and stored appropriately. This includes final project reports, project artifacts, and the lessons learned report.

5. Resource Offboarding: Ensure that all project resources, including physical and digital assets, are accounted for and returned or stored as appropriate.

6. Transition Plan: If the project resulted in a product, system, or service that will be maintained beyond the life of the project, ensure there is a clear transition plan in place. This might involve transitioning the product to a maintenance team or training staff to manage the new system.

7. Future Opportunities: Discuss future opportunities with the team members. If they performed well, would there be opportunities to work together on future projects? Could they take on larger roles or new responsibilities?

8. Project Closure Report: Finalize the project closure report which outlines the project's performance in terms of cost, schedule, scope, and quality.

9. Reassign Team Members: Once all closing activities are completed, team members can be reassigned to other projects or their usual roles. Ensure that this process is done smoothly and that each member knows their next steps.

Remember, ending a project is just as important as initiating and executing it. How you disband a project team can impact team members' morale, their view of the project, and their willingness to participate in future projects.

Q25 How can you continually improve the performance of your project team, from project to project?

Model answer:

Continuous improvement of your project team's performance is a crucial aspect of effective project management. Here are some strategies to help you achieve this goal:

1. Post-Project Reviews: After each project, conduct a post-mortem or lessons learned session. Discuss what went well, what didn't, and how the team can improve in the next project. Make sure to document these learnings and apply them to future projects.

2. Continuous Learning and Training: Encourage and facilitate continuous learning and professional development. This could be through training courses, workshops, conferences, webinars, or self-study. This helps your team keep up with new project management techniques, technologies, and best practices.

3. Feedback Mechanisms: Implement regular feedback mechanisms, such as 360-degree feedback, where team members can provide and receive feedback from their peers, subordinates, and superiors. This helps identify strengths and areas for improvement.

4. Performance Metrics: Track performance metrics for your team. This could include project delivery times, budget adherence, quality metrics, stakeholder satisfaction, etc. Use these metrics to identify areas where the team is performing well and where there's room for improvement.

5. Reward and Recognition: Recognize and reward good performance. This encourages team members to continually strive for excellence. Rewards can be monetary (bonuses, raises), but non-monetary recognition (praise, awards, extra time off) can be just as effective.

6. Promote a Culture of Continuous Improvement: Encourage team members to continually look for ways to improve their own performance and the performance of the team. This could be through suggestion schemes, regular brainstorming sessions, or innovation challenges.

7. Effective Communication: Ensure open and effective communication within the team. This helps to identify and resolve issues early, improves collaboration, and ensures everyone is aligned towards the project goals.

8. Use of Project Management Tools: Use project management tools and software that can help the team manage their tasks more efficiently. This can improve collaboration, task tracking, resource management, and overall project management.

9. Team Building Activities: Regular team-building activities can improve team cohesion, communication, and problem-solving skills, leading to improved team performance.

10. Leadership: As a project manager, lead by example. Demonstrate a commitment to continuous improvement in your own work. This can inspire your team to do the same.

Remember, continuous improvement is a long-term commitment and requires ongoing effort. But the potential benefits in terms of improved performance and project success are well worth the effort.

Reflection

Reflect on two or more projects you recently contributed to.	Project 1	Project 2
R13 Give two examples of times you have identified and organised training and development for a project team member. *<u>Essential requirements:</u>* Must be examples from at least two different projects. *Identify and organise project personnel training and development.*		
R14 What are some of the tools and techniques you use to get the most out of project team members? Give examples. *<u>Essential requirements:</u>* Must be examples from at least two different projects. *Apply human resource management (HRM) methods, techniques and tools to the project.*		

R15 What has been your biggest project leadership challenge to date? *<u>Essential requirements:</u>* *Procedures for interpersonal communication, counselling, and conflict resolution.*		

BSBTWK503 Manage meetings

Performance tasks

T7 Prepare an agenda for an actual meeting you will conduct.

Include the text of the email you send with the agenda inviting participants to the meeting.

Essential requirements:

All fields must be sufficiently detailed.

T8 Prepare minutes for a meeting you conducted.

Include the text of the email you send with the minutes thanking participants for their attendance.

Essential requirements:

All fields must be sufficiently detailed.

Knowledge questions

Q26 How should you prepare project stakeholders for a virtual (online) meeting?

Model answer:

Preparing project stakeholders for a virtual meeting isn't much different from an in-person one, but there are some additional technical aspects to consider. Here's how you can prepare stakeholders:

1. **Communicate the Purpose and Objectives**: Clearly explain the purpose of the meeting, what you hope to achieve, and why their participation is important.

2. **Provide an Agenda**: Share the meeting agenda in advance. The agenda should outline the topics to be discussed, the order of discussion, and who will lead each part.

3. **Distribute Pre-Meeting Materials**: If there are any documents, reports, or other materials that stakeholders should review before the meeting, send these out well in advance.

4. **Identify Roles**: If any stakeholders have specific roles in the meeting (such as presenting a topic), make sure they know this ahead of time.

5. **Set Expectations**: Make it clear what's expected of stakeholders during the meeting. This could be providing feedback, making a decision, or participating in brainstorming sessions.

6. **Technical Preparation**: Ensure stakeholders have the necessary technology to participate in the meeting. This might include a computer with a reliable internet connection, a webcam, and a microphone.

7. **Platform Familiarization**: Provide stakeholders with information about the virtual meeting platform. This could be as simple as a link to a tutorial, or more detailed instructions about how to use the platform. If necessary, have a test run before the actual meeting.

8. **Provide Meeting Details**: Send out a calendar invite or reminder with the date, time, and link to the virtual meeting. Include instructions for joining the meeting and what to do if they encounter technical difficulties.

9. **Encourage Preparation**: Ask stakeholders to come prepared with thoughts and questions on the topics to be discussed. They should also test their tech setup ahead of time to avoid last-minute glitches.

10. **Ask for Input**: Before finalizing the agenda, ask stakeholders if there are any topics they'd like to discuss or add. This can help them feel more engaged and valued in the process.

By ensuring your stakeholders are well-prepared for a virtual meeting, you can help the meeting run smoothly and increase the productivity of the discussion.

Q27 What are your responsibilities as the chair during a project meeting?

Model answer:

As the chair of a project meeting, you have several important responsibilities before, during, and after the meeting.

1. **Setting the Agenda**: This involves deciding the order of topics to be discussed and making sure all the necessary points are covered.

2. **Preparation**: Make sure all the necessary materials are ready for the meeting, including any data, reports, or other documents that will be discussed.

3. **Inviting Participants**: You are responsible for deciding who needs to be present at the meeting and making sure they are invited.

4. **Running the Meeting**: As the chair, you will lead the meeting. This involves introducing the agenda, setting the pace, directing the conversation, and ensuring everyone has an opportunity to speak.

5. **Time Management**: Ensure the meeting starts and ends on time and that each agenda item is given adequate time for discussion without letting any one topic monopolize the meeting.

6. **Facilitating Discussion**: Your role is to facilitate a productive discussion. This may involve asking questions, summarizing points, mediating disagreements, and preventing individuals from dominating the conversation.

7. **Decision Making**: As the chair, you may be called upon to help guide the team toward consensus or to make decisions when necessary.

8. **Summarizing and Clarifying**: Throughout the meeting, it's important to summarize or clarify points to ensure everyone understands.

9. **Action Items and Follow-Ups**: Before concluding the meeting, you should summarize the key decisions made, the action items identified, who is responsible for each action item, and by when it needs to be completed.

10. **Record Keeping**: After the meeting, it is usually the chair's responsibility (or they should delegate someone) to prepare and distribute minutes or a summary of the meeting, including key decisions and action items.

11. **Respecting and Encouraging Participation**: As the chair, one of your primary responsibilities is to create an environment where everyone feels comfortable contributing. This involves actively inviting input and making sure everyone's ideas are respected.

12. **Problem Solving**: During project meetings, issues or problems may arise. As the chair, you should guide the team in problem-solving and decision-making processes to keep the project moving forward.

13. **Maintaining Focus**: It's easy for meetings to go off track with side discussions. It's your responsibility to keep the meeting focused on the agenda items and to steer the conversation back when it strays.

In essence, the chair of a project meeting is the facilitator and director, ensuring that the meeting is productive, efficient, and successful in moving the project forward..

Q28 How can you facilitate the involvement of all meeting participants? How might you do this differently online versus in-person?

Model answer:

Facilitating the involvement of all meeting participants requires skillful communication and engagement techniques. Here are some strategies you might use:

In-Person Meetings:

1. **Establish a Safe Environment**: Encourage open dialogue and respect for all ideas. A non-judgmental atmosphere can help individuals feel more comfortable sharing their thoughts.

2. **Direct Questions to Individuals**: If someone hasn't spoken, ask them directly for their thoughts. But be careful not to put anyone on the spot uncomfortably.

3. **Encourage Participation**: At the start of the meeting, encourage everyone to participate. Make it clear that all voices and opinions are valuable.

4. **Balance Participation**: Keep an eye on who's dominating the conversation and who's not speaking up. If necessary, politely steer the conversation away from those talking too much and towards those who aren't.

5. **Use Group Activities**: Activities such as brainstorming sessions or group problem-solving tasks can encourage everyone to participate.

6. **Body Language**: Use positive body language to show that you're actively listening and value each participant's input.

Online Meetings:

1. **Use a "Raise Hand" Feature**: If your virtual platform has this feature, encourage its use. This helps maintain order and ensures everyone who wants to contribute can.

2. **Utilize Chat Function**: Participants can use chat to ask questions or make comments without interrupting the speaker. As a facilitator, monitor the chat and address these contributions as appropriate.

3. **Breakout Rooms**: Some virtual platforms offer breakout rooms for smaller group discussions. These can be more comfortable environments for those hesitant to speak up in larger groups.

4. **Use Polls and Surveys**: These tools can encourage involvement, even from those who may not feel comfortable speaking up.

5. **Direct Questions to Individuals**: Like in-person meetings, you can direct questions to individuals in online meetings as well.

6. **Ask for Video On**: When possible, ask participants to keep their video on to encourage engagement and make the meeting more personal.

7. **Encourage Reactions**: Most virtual platforms have "reaction" buttons for participants to use. Encourage their use to show agreement, appreciation, or other emotions.

8. **Schedule Breaks**: In longer online meetings, scheduled breaks can prevent online fatigue and help maintain engagement.

In both cases, the key is to create an environment where everyone feels their input is valued and respected, and to ensure everyone has the opportunity to contribute to the discussion.

Q29 What are meeting minutes? How and when are they best used?

Model answer:

Meeting minutes, also known as meeting notes or records, are a written record of everything that's discussed and agreed upon during a meeting. They can serve as a helpful reminder of what was discussed, decisions made, tasks assigned, and deadlines set. Here are the key components of meeting minutes:

1. **Meeting Details**: This includes the date, time, location (or virtual platform), those present, and those absent.

2. **Agenda Items**: List out all the items that were on the agenda for the meeting.

3. **Discussions**: This is a brief summary of the discussion that took place for each item, including different viewpoints expressed.

4. **Decisions Made**: Document any decisions that were made in the meeting.

5. **Action Items**: Write down any tasks that were assigned, who they were assigned to, and any deadlines set.

6. **Next Meeting Details**: If the date and time of the next meeting were decided, include these details.

7. **Adjournment**: Note the time the meeting was adjourned.

Minutes are usually taken by a designated person, often a secretary or administrative assistant, but it could be anyone appointed to do so. They should be distributed to all attendees, and even those who were absent, shortly after the meeting. This allows everyone to be on the same page about what was discussed and what the next steps are.

Meeting minutes are best used for:

1. **Reference**: Meeting minutes serve as a record that participants can refer back to. This can be useful for clarifying any confusion about what was discussed or decided.

2. **Accountability**: The documented action items and assigned responsibilities help hold individuals accountable for their tasks.

3. **Continuity**: If a team member leaves the project or new members join, meeting minutes provide a history of decisions made and discussions had.

4. **Legal Requirements**: In some cases, keeping meeting minutes is a legal requirement, such as for board meetings in many jurisdictions. They can serve as an official record of organizational decisions.

5. **Progress Tracking**: Meeting minutes can help track progress on a project over time, showing what decisions were made and when.

6. **Transparency**: Sharing meeting minutes with stakeholders or team members who were not present can promote transparency and inclusiveness.

In summary, meeting minutes are a crucial tool for effective meeting management and project tracking. They provide a written record that can be referred back to, promoting accountability, transparency, and tracking progress over time.

Q30 What instructions should you give to the person responsible for taking the minutes?

Model answer:

The person tasked with taking meeting minutes plays a crucial role in capturing the critical points of a meeting and providing a reference for attendees after the meeting. As such, it's essential that they have clear instructions. Here's what they need to know:

1. **Understand the Agenda**: The minute taker should familiarize themselves with the meeting agenda in advance. They should know what topics are to be discussed, who will be presenting, and what decisions or actions are expected.

2. **Record Basic Information**: They should begin by documenting essential details like the meeting's date, time, location (physical or virtual), attendees, and the chairperson's name.

3. **Note Key Points**: The minute taker isn't expected to transcribe the entire meeting, but they should record the main points, decisions, and action items for each agenda topic. They should also note any motions put forward, who proposed them, and the result of any votes.

4. **Track Action Items**: They need to write down any tasks or actions assigned, along with who is responsible for them and any deadlines. This is critical for holding people accountable for their responsibilities.

5. **Record Decisions**: Any decisions made should be clearly documented, along with how the decision was reached (for instance, a vote, consensus, or a decision by the chairperson).

6. **Be Objective**: Minutes should be neutral and objective. The minute taker should avoid personal commentary and focus on what was said and decided.

7. **Clarify Uncertainties**: If something is unclear during the meeting, they should feel empowered to ask for clarification to ensure the accuracy of the minutes.

8. **Review and Revise**: After the meeting, they should review and clean up the minutes while the discussion is still fresh in their mind.

9. **Share the Minutes**: Once they've finalized the minutes, they should share them with all attendees and other relevant stakeholders. This might involve emailing a document, sharing it in a collaborative workspace, or uploading it to a shared server.

10. **Format**: Discuss any specific formatting requirements. This might include how the minutes should be laid out, whether you want them to use bullet points or paragraphs, and any template they should use.

Ensure the person taking the minutes has all the necessary materials and understands the importance of their role. The accuracy and usefulness of the minutes will largely depend on their diligence and attention to detail.

Reflection

Reflect a meeting you recently led.	Project 1	Project 2
R16 Reflect on another meeting you recently led (not the one you sent through the agenda and minutes for). **Talk through the process from initiation to close.** **What worked well? What can you improve on next time?** <u>*Essential requirements:*</u> *Apply conventions and procedures for meetings including:* • *developing and distributing agendas and papers* • *identifying and inviting meeting participants* • *organising and confirming meeting arrangements* • *conducting meeting* • *completing meeting-follow up actions* *Follow relevant organisational policies and procedures.*	T 7-8	

BSBPMG535 Manage project information and communication

Performance tasks

There is no performance task for this unit.

Knowledge questions

Q31 What are the typical policies and procedures in an organisation that govern communication?

Model answer:

Every organization has a set of policies and procedures that govern communication. These can vary widely depending on the organization's size, industry, culture, and other factors, but here are some of the typical ones:

1. Email Policy: These policies often govern the appropriate use of company email, including guidelines on the content, attachments, frequency, and confidentiality of emails. It may also outline procedures for the retention and deletion of emails.

2. Social Media Policy: This outlines how employees can use social media in a professional context, including what information can be shared about the company, and how to handle negative comments or criticism.

3. Internet Usage Policy: This policy may include rules about acceptable internet use during work hours, including guidelines on visiting non-work-related sites.

4. Data Security Policy: This policy typically outlines the measures employees must take to secure electronic communication, such as encrypting sensitive emails, regularly updating passwords, and not sharing confidential information outside the company.

5. Code of Conduct: A code of conduct usually includes guidelines on how employees should communicate with each other, with clients, and with external parties. This often includes rules about respect, non-discrimination, and harassment.

6. Privacy Policy: Privacy policies outline how personal data should be handled in communication, including how it can be collected, stored, used, and shared.

7. Public Relations Policy: This often includes rules about who can speak to the media or make public statements on behalf of the company, and the approval processes for such communications.

8. Crisis Communication Policy: This outlines how communication should be handled in a crisis or emergency situation, including who should be notified, who can make public statements, and how information should be disseminated.

9. Meeting Protocol: Guidelines on conducting and participating in meetings, such as scheduling procedures, required attendees, agenda-setting, decision-making processes, and record-keeping.

It's important for all employees to be aware of and understand these policies and procedures, as they help to ensure clear, effective, and appropriate communication within and outside the organization. If you're unsure about the policies in your own organization, check with your manager or HR department. They should be able to provide you with the necessary information or direct you to where it can be found..

Q32 How should you store project data in a way that is both secure and auditable?

Model answer:

The process of storing project data involves managing a lot of sensitive information. To do this effectively, the data must be secure to protect confidentiality, and auditable to ensure compliance with regulations and to track changes over time. Here are some steps to store project data securely and in an auditable manner:

1. Choose a Secure Storage System: Use a secure, reliable system to store your project data. This could be a secure cloud-based storage service or an on-premise server. The system should be protected with strong security measures, including firewalls, encryption, and regular security updates.

2. Access Control: Implement strong access control measures. Only authorized individuals should have access to project data, and different levels of access should be given based on roles. For instance, project managers might have access to all project data, while team members only have access to relevant sections.

3. Data Encryption: Encrypt sensitive data both in transit and at rest. Encryption converts data into a code to prevent unauthorized access.

4. Backup and Recovery: Regularly back up project data to ensure it can be recovered in case of data loss. Also, have a disaster recovery plan in place to handle scenarios like data breaches or system failures.

5. Audit Trails: Enable audit logging to track who accesses data and what changes are made. Audit logs are crucial for reviewing and investigating actions taken within the system.

6. Regular Audits: Conduct regular audits of your data security practices to identify potential vulnerabilities and ensure compliance with relevant regulations.

7. Data Retention Policy: Have a clear data retention policy that stipulates how long different types of data should be stored, and when and how they should be disposed of.

8. Training: Train all project team members on the importance of data security and their role in ensuring it. This should cover secure data handling practices and how to identify and report security threats.

9. Use of Project Management Software: Use project management software with robust security features and detailed audit logs. This allows for secure storage, easy access, and tracking of project data.

10. Regular Updates and Patches: Keep all systems, software, and devices that process and store data up-to-date with the latest security patches.

By following these steps, you can ensure that your project data is stored securely and is available for audit when needed. This not only helps protect the integrity of your project but also builds trust with stakeholders and clients.

Q33 How do you know if your project information and communication management systems are working as intended?

Model answer:

Project Information and Communication Management Systems are specific tools that facilitate information sharing and communication between team members working on a project. These systems are integral in planning, executing, and monitoring the progress of a project. Below are some ways to assess if your system is working as intended:

1. Project Efficiency: One of the key roles of a project information and communication management system is to increase efficiency in project execution. If projects are meeting their milestones on time and staying within budget, it could indicate the system is working well.

2. Effective Communication: Check if communication among project stakeholders (team members, clients, and others) is efficient and productive. Are messages delivered promptly? Are meetings well-coordinated and useful?

3. Data Consistency and Accuracy: The information available should be consistent across the board, and it should be accurate. This can be checked by performing regular data audits.

4. User-Friendly Interface: The system should be easy to navigate, understand, and use for all team members. Collect feedback from users and make necessary adjustments.

5. Integration with Other Systems: The ability to integrate with other systems, such as project management tools, calendars, or email systems, increases the utility of your project information and communication management system.

6. System Security: Confidential project information should be adequately protected. Regular security audits and penetration tests can help ensure the security of the system.

7. Adaptability and Scalability: As projects grow in size and complexity, the system should be able to adapt and scale to meet these demands. Regular testing and monitoring can help assess this.

8. Reporting Capabilities: Effective reporting is a key part of project management. The system should be able to produce useful reports that help stakeholders understand the progress and status of the project.

9. Real-time Collaboration: Check if the system allows for effective real-time collaboration, crucial in today's dynamic and often remote or distributed project environments.

10. Stakeholder Satisfaction: Collect feedback from team members, clients, and other stakeholders to gauge their satisfaction with the system.

Keep in mind that continuous improvement is important. Therefore, periodically review the system and make necessary improvements based on feedback and changing project needs.

Q34 When closing a project, how should you finalise and archive all the project records and data?

Model answer:

Properly closing a project involves a comprehensive process that not only includes finalizing and archiving project records and data but also performing a post-project evaluation and celebrating the project's completion. Here are steps you should consider when finalizing and archiving project records and data:

1. Organize Project Records: Project records and data typically include documents like project plans, risk registers, stakeholder registers, change requests, meeting minutes, financial records, project schedules, and more. Make sure all these documents are up-to-date and correctly organized.

2. Finalize Documentation: Update all project documents to reflect the final state of the project. This might involve making final amendments to project plans, closing out risk and issue logs, and updating financial records to reflect final costs.

3. Review and Validate: Review all the documents to ensure accuracy and completeness. This step could involve other team members or stakeholders to validate the information.

4. Data Backup: Before you start archiving, ensure you have a backup of all the project records and data. This can help prevent loss of data.

5. Archive Data: Use your organization's preferred method of data storage to archive project documents. This could be a cloud-based solution, a project management software, or even a local server, depending on your organization's policies and the sensitivity of the data.

6. Index and Catalogue: Catalogue and index all project documents in a way that makes it easy to retrieve information in the future. It's essential that you or other future project managers can find and access this data easily.

7. Security and Confidentiality: Depending on the nature of the project, there may be confidential or sensitive information in your project records. Make sure these documents are stored securely, with access given only to those who need it.

8. Share Lessons Learned: It's crucial to document the lessons learned during the project and share them with the appropriate stakeholders. This could be in the form of a report or a meeting.

9. Compliance with Laws and Regulations: Depending on your industry and the nature of the project, there may be specific laws and regulations around how long project records need to be kept and how they should be stored. Make sure you're in compliance with these laws.

10. Close Out Any Software or Systems Used: If you used any project-specific software or tools during the project, make sure these are properly closed out, with data extracted and saved as needed.

Remember, each project is different, and you might need to adapt these steps to fit your project's specific requirements.

Q35 What feedback can you seek from stakeholders on how you manage and communicate information?

Model answer:

Stakeholder feedback is a critical component of successful project management, particularly in terms of information management and communication. Here are some areas where you can seek stakeholder feedback:

1. Frequency of Communication: Ask stakeholders whether they feel they're being updated too often, not often enough, or if the frequency is just right.

2. Clarity of Communication: Is the information being communicated clearly? Do stakeholders understand the project status, risks, changes, and other relevant information?

3. Relevance of Information: Are the updates relevant to the stakeholder? Are they receiving too much detail, not enough, or the right amount of information?

4. Communication Channels: Do stakeholders prefer email, meetings, phone calls, project management software, or another form of communication? Are the current channels effective, or are there others they would prefer?

5. Responsiveness: How well do stakeholders feel their queries or concerns are being responded to? Is the turnaround time satisfactory?

6. Engagement: Do stakeholders feel they're being appropriately engaged and their input is being valued?

7. Meeting Effectiveness: If meetings are a primary communication tool, ask for feedback on their effectiveness. Are they concise, well-managed, and focused? Are meeting agendas and minutes provided in a timely manner?

8. Accessibility of Information: Is project information easily accessible when stakeholders need it? Is the project management tool or system user-friendly and efficient?

9. Confidentiality and Data Management: Do stakeholders feel their information is being handled securely and confidentially?

To gather this feedback, you can use various methods such as one-on-one meetings, group discussions, surveys, or anonymous feedback tools. Remember, the goal is to continuously improve your project communication and management processes, so it's important to be open and responsive to the feedback you receive.

Reflection

Reflect on two or more projects you recently contributed to.	Project 1	Project 2
R17 Give an example of how have you managed a records and data management system for a project? <u>*Essential requirements:*</u> *Identify and analyse information requirements of the project.* *Establish a designated project-management information system.* *Manage generation, gathering, storage, retrieval, analysis and dissemination of information by project staff and stakeholders.* *Implement, modify, monitor and control designated information-validation processes.*		

R18 Over the course of your career, how has your approach to project communication changed or improved? *<u>Essential requirements:</u>* *Review project outcomes for effectiveness of management information and communication processes and procedures.* *Develop and document recommended improvements for application in future projects.*		

BSBPMG537 Manage project procurement

Performance tasks

T9 Prepare a request for proposal (RFP) for a procurement related to a professional or personal project.

Essential requirements:

All fields must be sufficiently detailed.

Knowledge questions

Q36 What process should you follow to identify and select suppliers of goods and services for a project?

Model answer (must include the following):

- *Stakeholder engagement*
- *Selection process*
- *Contract negotiation*

The process of selecting suppliers for goods and services involves several steps to ensure you get the best value and fit for your project needs. Here are the general steps that you can follow:

1. Define Your Needs: Identify exactly what you need in terms of goods and services for your project. Be as specific as possible about the requirements, including quantity, quality, timelines, and budget constraints.

2. Supplier Identification: Research potential suppliers that can provide what you need. This could involve online research, referrals, or contacting trade associations. Create a list of potential suppliers.

3. Request for Information (RFI): If necessary, an RFI can be sent to potential suppliers to get more information about their capabilities, experience, and suitability to your needs.

4. Request for Proposal (RFP) or Request for Quotation (RFQ): Once you've narrowed down your list, send an RFP or RFQ to the potential suppliers. This document should detail your requirements and ask for a proposal or quote from the supplier on how they will meet those requirements and at what cost.

5. Evaluate Proposals/Quotes: Evaluate the responses from each supplier against a set of criteria. This could include price, quality, delivery times, service, reliability, and supplier reputation. You might also consider factors like the supplier's sustainability practices or alignment with your company values.

6. Negotiate Terms: Once you've selected a preferred supplier, negotiate the terms of the contract. This could involve price negotiations, delivery schedules, payment terms, and the scope of services.

7. Formalize Contract: Formalize the agreement with your chosen supplier through a contract. This contract should outline all the terms and conditions agreed upon during negotiation.

8. Review Performance: Monitor the supplier's performance throughout the project to ensure they meet the terms of the contract. Regularly review and provide feedback.

9. Post-Project Evaluation: After the project is completed, evaluate the supplier's performance. Did they meet expectations? Were there any issues? This evaluation can inform future supplier selection processes.

Remember that selecting a supplier is not just about finding the lowest cost, but also about finding a supplier that you can build a long-term relationship with, who understands your business and can consistently meet your needs.

Q37 How should you monitor and control the work of project contractors?

Model answer (must include reference to record-keeping):

Contracts are critical in defining the terms and conditions of an agreement, outlining expectations and obligations for both parties. While the specifics can vary depending on the nature of the project and the agreement, a typical contract might include the following information:

1. Parties Involved: Clearly identify the parties involved in the contract, typically the buyer and the supplier.

2. Scope of Work: Describe in detail the goods or services that the supplier is expected to provide. This can include product specifications, deliverables, milestones, or any other aspect that defines the work to be done.

3. Price and Payment Terms: Specify the agreed-upon price for the goods or services and the terms of payment. This might include payment schedule, the form of payment, and conditions for any additional costs.

4. Delivery Terms: Outline when and how the goods or services will be delivered. This may also include delivery location, packaging and transportation requirements, and who bears the risk of loss or damage during transport.

5. Contract Duration: Specify the start and end date of the contract, and any conditions for renewal or extension.

6. Performance Standards: Define the standards or benchmarks that the supplier's performance will be measured against. This can also include any testing or inspection processes.

7. Penalties for Non-Performance: Specify the consequences if the supplier fails to meet the obligations of the contract. This can include penalties, the right to terminate the contract, or remediation steps.

8. Termination Clauses: Specify conditions under which the contract can be terminated, by either party, including any notice requirements.

9. Dispute Resolution: Describe how any disputes that arise will be resolved, whether through negotiation, mediation, arbitration, or court proceedings.

10. Confidentiality Clause: If applicable, include a clause that restricts both parties from sharing proprietary or confidential information.

11. Force Majeure: This clause frees both parties from liability or obligation in case of an event beyond their control, such as a natural disaster, war, or "act of God".

12. Applicable Law: Identify the law or jurisdiction that will govern the contract.

13. Signatures: Each party should sign and date the contract, indicating their agreement to the terms and conditions.

Given the legal nature of contracts, it's advisable to involve a legal expert in drafting and reviewing contract terms to ensure they accurately reflect the agreement and protect your interests.

Q38 What ethical and legal process should you follow once you identify the need to vary the terms of a procurement (contract)?

Model answer:

Monitoring and controlling the work of project contractors is critical to ensuring the successful completion of your project. Here's how you can effectively manage this:

1. Clear Expectations: Establish clear expectations from the onset. Make sure contractors understand the scope of work, deliverables, timelines, quality standards, and any other key expectations. This should be outlined in the contract.

2. Communication: Regular, open communication is key. This could be in the form of regular meetings, updates, or check-ins. Ensure there are open channels for contractors to ask questions, raise concerns, or provide updates.

3. Progress Reports: Ask for regular progress reports from the contractor. This could be weekly, biweekly, or monthly, depending on the length and complexity of the project. These reports should detail the work completed, any issues encountered, and the plan for the upcoming period.

4. Milestone Reviews: Review the contractor's work at key project milestones. This gives you the opportunity to assess their progress, provide feedback, and make any necessary adjustments.

5. Audits and Inspections: Depending on the nature of the work, you might need to conduct audits or inspections. This could be to assess the quality of the work, compliance with regulations, or adherence to safety standards.

6. Performance Metrics: Use performance metrics to assess the contractor's performance. This could be based on factors like quality of work, timeliness, cost-effectiveness, or adherence to safety standards.

7. Contract Compliance: Regularly review the contractor's compliance with the terms of the contract. This includes not just the delivery of work, but also factors like confidentiality, data security, or any other contractual obligations.

8. Issue Resolution: Be proactive in resolving any issues that arise. This could be through negotiation, mediation, or in accordance with any dispute resolution process outlined in the contract.

9. Feedback and Evaluation: Provide regular feedback to the contractor. After the project, conduct a formal evaluation of their performance. This can be used for future reference and to improve contractor management processes.

10. Contract Close-out: Once the project is completed, conduct a contract close-out process. This might include final payments, return of any materials or resources, and an official acknowledgement of contract completion.

Remember, effective contractor management is a balance of oversight and trust. While you need to monitor their work, it's also important to build a good working relationship based on trust and mutual respect.

Q39 How do you close out a contract and procurement?

Model answer:

Maintaining comprehensive records for each procurement is a crucial part of effective project management. These records not only ensure transparency and accountability but can also serve as valuable references for future projects. Here are some of the key records you should keep on each procurement:

1. Procurement Plan: This document outlines your strategy for procuring goods or services, including your approach to sourcing suppliers, the contract type you plan to use, and your plan for managing risks.

2. Vendor/Supplier Selection Documentation: This includes the Request for Proposal (RFP) or Request for Quotation (RFQ), vendor proposals, your evaluation criteria and scoring, and your final vendor selection rationale.

3. Contract: The contract with your supplier is a critical document. It includes terms such as scope of work, delivery timelines, payment terms, and other conditions.

4. Purchase Orders: These are the official documents sent to suppliers to confirm a purchase, outlining the goods or services to be supplied, the price, and delivery instructions.

5. Delivery Records: These could include shipping and receiving logs, confirmation of receipt, and any inspection or acceptance testing records.

6. Invoice and Payment Records: These include supplier invoices, your record of payments made, and any other relevant financial documentation.

7. Change Orders: Any changes to the scope of work, delivery schedule, or other contract terms should be documented in change orders.

8. Communication Records: Maintain a record of important communication with suppliers, including emails, meeting minutes, and other correspondence.

9. Performance Reports: These reports track the supplier's performance against the contract terms, including the quality of goods or services delivered, adherence to schedule, and any issues or challenges encountered.

10. Dispute Records: If any disputes arise, keep detailed records of the issue, any negotiations or resolution attempts, and the final outcome.

11. Close-out Report: Once the contract is complete, a close-out report summarizes the procurement process, the supplier's performance, any issues encountered, and lessons learned.

Remember, these records should be stored in a secure, organized, and easily accessible manner to ensure they can be referenced as needed for audits, disputes, or future procurement activities.

Q40 How might procurement records and other stakeholder feedback inform future procurement policies and procedures?

Model answer:

Maintaining comprehensive procurement records and gathering stakeholder feedback are critical aspects of improving and evolving procurement policies and procedures. They provide historical data and insight that can be used to refine the procurement process and mitigate risks in future projects. Here's how they can inform future procurement policies and procedures:

1. Vendor Performance: Records on supplier performance can be used to develop a preferred supplier list or to blacklist problematic suppliers. It can also provide insight into what types of suppliers are best suited to your needs.

2. Efficiency of Procurement Processes: Analysis of procurement records can help identify bottlenecks or inefficiencies in your processes. For example, you may find that a certain stage in the vendor selection process consistently causes delays and needs to be streamlined.

3. Risk Management: Procurement records can provide valuable data for managing risks. By reviewing issues that arose in past projects, you can put measures in place to prevent these problems in the future.

4. Cost Control: Reviewing cost records can help identify areas where costs can be reduced, or where budgeting needs to be more accurate. It can also help in negotiating prices with suppliers.

5. Contract Management: By examining past contracts, you can improve your contract terms to better protect your interests. This could include better definitions of scope, clearer delivery terms, or more effective dispute resolution clauses.

6. Stakeholder Satisfaction: Stakeholder feedback can provide insight into how well the procurement process is meeting the needs of the project and the team. This can help inform changes to improve satisfaction.

7. Legal Compliance: Review of procurement records can also help ensure that your procedures are in compliance with any relevant laws or regulations, and make necessary adjustments if they're not.

8. Lessons Learned: Overall, these records and feedback allow you to perform a "lessons learned" analysis for continuous improvement. By understanding what worked well and what didn't, you can implement changes to your procurement policies and procedures to increase efficiency, cost-effectiveness, and success in future projects.

Remember, this is a continuous process – regular review of procurement records and stakeholder feedback should be integrated into your project management procedures to ensure ongoing improvement.

Reflection

Reflect on two or more projects you recently contributed to.	Project 1	Project 2
R19 Detail two separate occasions you have procured goods or services for a project. *Essential requirements:* Must be examples from at least two different projects. *Determine procurement requirements and produce a procurement management plan.* *Carry out procurement and contracting activities according to agreed processes.*		
R20 Give an example from a project where you made a successful procurement. Give an example from a different project where you got it wrong! *Essential requirements:* Must be examples from at least two different projects. Challenge them on why they got it right or wrong. *Monitor activities across a project's life cycle and resolve issues that could affect achievement of project objectives.* *Identify and act according to probity and project governance constraints.*		
R21 What information do you record over the life of a procurement? How do you use those records to continually improve? *Essential requirements:* Process must have been applied to at least two different projects. *Create and maintain procurement records and documentation according to requirements of project and organisation.* *Document a review of procurement management processes and procedures.*		

BSBPMG536 Manage project risk

Performance tasks

T10 Prepare a risk register and management plan or a relevant professional or personal project.

Essential requirements:

A minimum of five entries.

All fields must be sufficiently detailed.

Knowledge questions

Q41 What principles should you keep in mind when identifying project risks?

Model answer:

Identifying project risks is a key part of successful project management. Here are some guiding principles to keep in mind when performing risk identification:

1. Comprehensiveness: Risk identification should be thorough and cover all aspects of the project. This includes internal and external risks, positive (opportunities) and negative (threats) risks, and risks across all phases of the project lifecycle.

2. Inclusivity: Engage all relevant stakeholders in the risk identification process. Different perspectives can help uncover risks that might be overlooked by a single person or function. This could include the project team, subject matter experts, customers, suppliers, or other key stakeholders.

3. Systematic Approach: Risk identification should follow a systematic and structured process. This could include methods such as brainstorming, SWOT analysis (Strengths, Weaknesses, Opportunities, Threats), Delphi technique (collecting expert opinions), or use of risk checklists and prompt lists.

4. Regular Review: Risks aren't static - they can change as the project progresses. Regularly review and update your risk register to ensure it remains current.

5. Risk Factors: Consider all relevant risk factors. This could include technical complexities, resource availability, regulatory environment, market conditions, or other project-specific factors.

6. Historical Data: Review historical data from similar past projects. Lessons learned from these projects can help identify potential risks for current and future projects.

7. Forward Thinking: Be forward-looking. Consider potential future changes that could impact your project, such as evolving technology, market trends, or regulatory changes.

8. Documentation: Document all identified risks in a risk register. This should include a description of the risk, its potential impact, and its probability.

9. Risk Ownership: Assign a risk owner for each identified risk. The owner should be responsible for managing the risk and implementing the response strategy.

10. Response Planning: While the main focus is on identifying risks, it's useful to start thinking about potential risk response strategies. This includes whether to accept, avoid, transfer, or mitigate each risk.

Remember, the goal of risk identification is not to eliminate all risks (which is rarely possible), but to understand and plan for them to the best of your ability. A robust risk identification process lays the foundation for effective risk management throughout the project.

Q42 How should you prioritise project risks?

Model answer:

Prioritising project risks is an important step in risk management. It helps to focus efforts and resources on the risks that could have the greatest impact on your project. Here's how to prioritise project risks:

1. Risk Assessment: The first step is to assess each identified risk in terms of its likelihood of occurrence and potential impact on the project. This is typically done through a process of risk analysis, which can be qualitative or quantitative.

2. Risk Matrix: A common tool used to prioritise risks is the risk matrix (or risk map). This is a grid that plots the likelihood of each risk on one axis and its impact on the other. Risks that are both likely and high impact fall into the top-right quadrant of the matrix, indicating they should be the highest priority.

3. Risk Scoring: Another approach is to assign a risk score to each risk, based on its likelihood and impact. The score is calculated by multiplying the likelihood and impact ratings (which might be on a scale of 1-10, for example). The higher the score, the higher the priority.

4. Risk Tolerance: Consider the risk tolerance or appetite of your organisation or stakeholders. Some may be more willing to accept certain types of risks, which could influence their priority.

5. Risk Categories: You can also categorise risks based on their nature (e.g., technical, financial, operational, etc.). High priority might be given to categories that are most critical to your project.

6. Urgency: Some risks might require immediate action, even if their overall score isn't the highest. This could be due to a rapidly closing window of opportunity or a risk that could have a cascading effect on other aspects of the project.

7. Risk Interdependencies: Consider the interdependencies between risks. Some risks might trigger others, or the impact of one risk could be amplified by another. These risk chains should be given higher priority.

Once risks are prioritised, you can focus your risk response planning efforts on the highest priority risks. But remember, risk priorities can change as your project progresses and new information becomes available, so regular review and re-prioritisation are key.

Q43 What are some of the things you can do to treat project risks? Give examples.

Model answer:

Treating project risks means developing strategies to manage them. Typically, there are four main strategies for dealing with risk: Avoidance, Transference, Mitigation, and Acceptance. Each of these can be appropriate depending on the nature of the risk and the context of the project:

1. Avoidance: This strategy involves changing the project plan to eliminate the risk or to protect the project objectives from its impact.

Example: If there's a high risk associated with using a new technology due to lack of expertise within the team, the project plan could be revised to use a familiar technology instead.

2. Transference: This means passing the risk to a third party along with the ownership of the response. This doesn't eliminate the risk but can reduce its impact on the project.

Example: Insurance is a form of risk transference. If there's a risk of damage to project equipment, an insurance policy could transfer that financial risk to the insurer. Another example is using contracts to transfer certain risks to vendors or subcontractors.

3. Mitigation: This approach aims to reduce the probability of occurrence or impact of a risk.

Example: If there's a risk of project delays due to dependence on a single key supplier, a mitigation strategy could be to identify backup suppliers or to increase inventory of key supplies.

4. Acceptance: Some risks may be accepted if their likelihood or impact is low, or if the cost of treating them is greater than the potential impact. This could be passive acceptance (just acknowledging the risk and responding if it occurs) or active acceptance (setting aside contingency resources to handle the risk if it occurs).

Example: A small risk of minor cost overruns might be accepted, with funds allocated in the project budget to cover potential overruns.

A fifth strategy is Exploitation, which is used for positive risks or opportunities. This aims to ensure the opportunity is realized.

Example: If there's a chance of finishing the project ahead of schedule if extra resources are obtained, an exploitation strategy could involve allocating the additional resources to make sure the project is completed early.

In all cases, it's important to assign a risk owner who is responsible for implementing the risk response strategy and monitoring the risk. Also, the chosen strategy should be documented in the risk register, along with the details of the risk and its potential impact.

Q44 How should you track (monitor and control) project risks?

Model answer:

Monitoring and controlling project risks is an ongoing process throughout the project lifecycle. The goal is to track identified risks, uncover new risks, and ensure the effectiveness of risk response plans. Here are some steps to track (monitor and control) project risks:

1. Update Risk Register: The risk register, a document where all details about identified project risks are recorded, should be regularly updated. This includes information on risk probability, impact, priority, response strategies, and assigned owners.

2. Track Risk Triggers: Risk triggers are symptoms or warning signs that a risk event is about to occur. By monitoring these triggers, you can catch risks early and respond before they become issues.

3. Perform Regular Risk Reviews: Schedule regular risk review meetings with your project team and stakeholders. These meetings can help you understand the status of current risks and identify new ones. The frequency of these reviews depends on the nature and complexity of your project.

4. Measure Effectiveness of Risk Responses: For risks where response plans have been implemented, assess whether these strategies are working as intended. If a risk response strategy is not effective, it may need to be revised.

5. Risk Audits: Risk audits are in-depth examinations of how risks are being managed in the project. They can help identify strengths and weaknesses in your risk management process, and suggest improvements.

6. Report on Risk Management: Provide regular updates on risk management to stakeholders. This could be part of your regular project status reporting, or separate risk reports for high-risk projects.

7. Update Risk Management Plan: The risk management plan outlines how risks are managed on your project. It should be updated as necessary to reflect changes in how you manage risks.

8. Document Lessons Learned: At the end of the project, or after major project phases, document what was learned about managing risks. This can help improve risk management on future projects.

Remember, the goal of risk tracking isn't to eliminate all risks—that's usually not possible. Instead, the aim is to understand the risks, keep them under control, and ensure that the project can still achieve its objectives even when risks materialize.

Q45 How should you review your risk management processes and continually improve as an organisation?

Model answer:

Continuous improvement is an essential part of any process, including risk management. It ensures that the process stays effective and relevant over time, and it enables learning and growth within the organisation. Here's how you can review and continually improve your risk management processes:

1. Conduct Regular Reviews: Regular reviews or audits of the risk management process should be conducted to ensure it's effective and efficient. This could be done internally or by an external auditor. It should examine how risks are identified, assessed, prioritized, responded to, and monitored.

2. Document Lessons Learned: After each project or significant milestone, document the lessons learned from the risk management process. What risks were not identified? Which risks were managed well, and which were not? What can be done differently next time?

3. Collect Feedback: Solicit feedback from stakeholders involved in the risk management process, including project team members, project managers, executives, clients, and others. This feedback can provide valuable insights into what's working and what's not.

4. Benchmarking: Compare your risk management process to industry best practices or to similar organisations. This can reveal areas where your process could be improved.

5. Training and Development: Provide regular training and development opportunities for those involved in risk management. This could include training on new risk management techniques, tools, or methodologies.

6. Update Policies and Procedures: Based on the findings from reviews, feedback, and benchmarking, update your risk management policies and procedures. This could involve changing how risks are identified, introducing new tools for risk assessment, or revising how risk responses are implemented.

7. Monitor Key Performance Indicators (KPIs): Develop KPIs for your risk management process. These could include measures of how many risks were identified early, how many risks were successfully mitigated, or how accurate risk assessments were. Monitor these KPIs over time to measure the effectiveness of your risk management process.

8. Use a Continuous Improvement Model: Models such as the Plan-Do-Check-Act (PDCA) or Define-Measure-Analyze-Improve-Control (DMAIC) can provide a structured approach to continuous improvement.

Remember, the goal of continuous improvement is not to create a "perfect" risk management process—since the nature of projects and risks will always involve some level of uncertainty. Rather, the aim is to make your process as effective and efficient as possible, and to foster a culture that values effective risk management.

Reflection

Reflect on two or more projects you recently contributed to.	Project 1	Project 2
R22 Give an example of how you identified, prioritized and treated risks in a project. *<u>Essential requirements:</u>* *Conduct effective risk management processes for a project of sufficient complexity.* *Apply risk management techniques, strategies and tools.*	T 10	
R23 Give an example from a project where you successfully identified and controlled a risk during project delivery. Give an example from a different project where you got it wrong! *<u>Essential requirements:</u>* Challenge them on why they got it right or wrong. *Conduct effective risk management processes for a project of sufficient complexity.* *Apply risk management techniques, strategies and tools.*	T 10	

R24 How have you improved your approach to project risk over time? *<u>Essential requirements:</u>* *Evaluate, review and report on risk-management processes and make recommendations for future improvements.*		

BSBPMG532 Manage project quality

Performance tasks

T11 Complete a detailed report on the status of a relevant professional or personal project.

Essential requirements:

All fields must be sufficiently detailed.

T12 Prepare a detailed change request for a significant issue identified in your status report.

Essential requirements:

All fields must be sufficiently detailed.

The change must significantly impact at least one project outcome.

Knowledge questions

Q46 What are project acceptance criteria? How do you use stakeholder input and organisation policy to define them?

Model answer:

Project acceptance criteria are the conditions that a project product must meet to be accepted by the stakeholder, client, or end user. They provide a clear definition of what is expected of the final deliverable and provide a way to measure whether the project has successfully achieved its objectives. They are typically defined at the start of the project during the planning phase and are included in the project scope statement.

Here's how you can use stakeholder input and organisational policy to define project acceptance criteria:

Stakeholder Input:

Stakeholders are the individuals or groups who have a vested interest in the project. This can include the project sponsor, client, end-users, project team members, and any other parties affected by the project. Stakeholder input is crucial when defining acceptance criteria as they are the ones who will ultimately judge whether the project deliverables meet their expectations.

1. Interviews or Meetings: Conduct interviews or meetings with stakeholders to understand their needs, wants, and expectations for the project. Ask specific questions about what they would consider a successful project outcome.

2. Workshops: Conduct workshops with stakeholders to collaboratively define acceptance criteria. This allows for different viewpoints to be considered and ensures that all key aspects are covered.

3. Surveys or Questionnaires: Use surveys or questionnaires to gather input from a larger group of stakeholders. This can be useful when it's not practical to meet with every stakeholder individually.

Organisational Policy:

Organisational policies provide a framework for decision-making and help to ensure consistency across projects. They can influence the acceptance criteria in several ways:

1. Quality Standards: The organisation may have certain quality standards that all projects must meet. These would be included in the acceptance criteria.

2. Regulatory Requirements: If the organisation operates in a regulated industry, there may be certain legal or regulatory requirements that need to be met. These should be included in the acceptance criteria.

3. Strategic Objectives: The organisation's strategic objectives should be considered when defining acceptance criteria. The project should contribute to these objectives in some way.

4. Risk Management Policies: The organisation's risk management policies may also influence the acceptance criteria. For example, there may be certain risks that the organisation is not willing to accept, which would need to be considered when defining the acceptance criteria.

By involving stakeholders and considering organisational policies when defining acceptance criteria, you help to ensure that the project will meet the needs of those it's intended to benefit, and that it aligns with the broader goals and values of the organisation.

Q47 How do you assure project management processes are followed at every stage? What should you do if they fall short?

Model answer:

Ensuring project management processes are adhered to at every stage is crucial for the successful execution of a project. Here are several methods to achieve this:

1. Training and Orientation: Before initiating the project, provide training and orientation to the team members on the project management processes to be followed. This can ensure that everyone understands their roles, responsibilities, and the specific protocols that need to be followed.

2. Project Management Plan: Establish a clear project management plan that outlines the processes and procedures to be followed during each phase of the project. This plan should be communicated to and understood by all project team members.

3. Regular Monitoring and Reporting: Regularly monitor the project's progress and check whether the project management processes are being followed. Status reports, meetings, and project tracking tools can provide valuable insights into the project's progression.

4. Project Audits: Periodic project audits or reviews can ensure processes are being followed and can help identify deviations from the planned processes. These audits may include reviewing documentation, observing team activities, or interviewing team members.

5. Checklists: Use checklists for different stages of the project to ensure that all necessary steps are being followed.

6. Document Control and Management: Implement a document control system that ensures only the latest and approved versions of the processes are in use.

7. Use of Project Management Software: Many project management tools have features to track task completion, deadlines, and adherence to planned processes, which can help ensure compliance.

In case your team falls short of adhering to the project management processes:

1. Identify the Cause: Understand why the processes aren't being followed. Is it due to lack of training, communication issues, or are the processes too complex or time-consuming?

2. Communicate: Have a discussion with the team members involved to understand their perspective. Clear any misconceptions or doubts they may have regarding the processes.

3. Provide Additional Training: If necessary, provide additional training to the team members on the importance of following the project management processes and how to follow them.

4. Modify Processes: If the current processes are too complex or ineffective, consider modifying them to make them more efficient and easy to follow. This should involve input from the team to ensure practicality.

5. Monitor More Closely: If the problem persists, it may be necessary to monitor project activities more closely until the team gets back on track.

Remember, the goal of project management processes is to help guide the project to a successful conclusion. They should be practical, efficient, and flexible enough to accommodate the unique needs and characteristics of each project.

Q48 How do you control the quality of project deliverables?

Model answer:

Quality control of project deliverables is a critical part of project management, ensuring that the final output meets the required standards and expectations. Here are several steps you can follow to control the quality of project deliverables:

1. Define Quality Standards: Begin by defining what quality means for your project. These quality standards will be based on the project's objectives, stakeholder expectations, regulatory requirements, and industry best practices.

2. Develop a Quality Management Plan: Create a Quality Management Plan that details how the project team will achieve the desired quality levels. It should include quality objectives, quality control and assurance activities, roles and responsibilities, and the procedures for dealing with quality issues.

3. Use Quality Assurance Processes: Implement quality assurance processes to ensure that the project is following the defined processes and standards. This may include regular audits, process reviews, and continuous process improvement activities.

4. Perform Quality Control Checks: Quality control checks involve inspecting the deliverables and project work to ensure they meet the defined quality standards. This may involve testing, inspections, reviews, or audits. Any deviations from the quality standards are recorded as defects or issues.

5. Use Quality Control Tools and Techniques: Employ various quality control tools and techniques such as statistical process control, Six Sigma, control charts, Pareto charts, etc., to monitor and control the quality of the deliverables.

6. Document and Analyze Issues: When quality issues are identified, document them, and analyze their cause. This analysis can help to identify underlying process issues that are impacting quality.

7. Implement Corrective Actions: Once the root cause of a quality issue is identified, implement corrective actions to resolve the issue and prevent it from reoccurring.

8. Validate Deliverables: Before the deliverables are handed over to the client or stakeholder, validate that they meet the quality standards and the requirements of the client.

9. Use Lessons Learned for Continuous Improvement: After the project or project phase is completed, document the lessons learned from the quality control process and use them to improve your quality control processes in future projects.

Quality control is not a one-time activity but an ongoing process throughout the project lifecycle. It requires commitment from the entire project team and should be a key focus area for the project manager.

Q49 How do you continually improve processes *during* project delivery?

Model answer:

Continual improvement is a crucial aspect of project management. It involves regularly reviewing and enhancing project processes and practices to increase efficiency, reduce waste, and drive better outcomes. Here's how you can achieve continual improvement during project delivery:

1. Regular Reviews: Schedule regular reviews or audits of project processes. This could involve analyzing project reports, meeting minutes, or other documents to identify bottlenecks, inefficiencies, or other areas for improvement.

2. Feedback Collection: Actively collect feedback from team members, stakeholders, and clients. These insights can provide valuable information about what's working well and what isn't.

3. Lessons Learned Sessions: Conduct lessons learned sessions at different stages of the project, not just at the end. This allows you to implement improvements during the project rather than waiting until it's over.

4. Benchmarking: Compare your processes and performance against industry standards or similar projects within your organization. This can highlight areas where your project could be improved.

5. Use Process Improvement Techniques: Techniques such as Lean, Six Sigma, or Kaizen can be used to systematically analyze and improve project processes.

6. Encourage Innovation: Foster a culture that encourages team members to come up with innovative ideas to improve processes.

7. Training and Development: Regularly train team members on new tools, technologies, and best practices. This can help them to perform their tasks more efficiently and effectively.

8. Implement Changes: Once you've identified an area for improvement, implement changes. This might involve adjusting a process, adopting a new tool, or reassigning tasks within the team.

9. Measure Impact: After making changes, measure the impact to ensure that they have resulted in improvement. Use KPIs or other metrics relevant to the process you're trying to improve.

10. Document Changes: Keep track of changes made, why they were made, and their impact. This can help you to better understand the improvement process and can provide valuable information for future projects.

Remember, continual improvement is an ongoing process, and it involves a commitment to regularly reviewing and improving project processes even as you focus on delivering the project.

Q50 How do you document lessons learned continual improve processes from project-to-project?

Model answer:

The process of documenting and applying lessons learned is an essential part of project management and can lead to significant improvements in efficiency and outcomes for future projects. Here's how you can go about it:

1. Conduct Lessons Learned Sessions: At different stages of the project, especially at project closure, gather your team and stakeholders to reflect on what went well and what didn't. These discussions should cover all areas of the project, including planning, execution, communication, and more.

2. Encourage Open and Honest Feedback: During these sessions, it's important that everyone feels comfortable sharing their thoughts and experiences. Foster an environment that encourages open and honest feedback.

3. Document the Lessons: Document all the feedback and insights gained during these discussions. This should not just include the lessons themselves, but also the context so that future project teams can understand the situations in which these lessons were learned.

4. Categorize and Store Lessons: Group the lessons into categories, like communication, risk management, resource allocation, etc., to make it easier for future teams to find relevant information. Store these lessons in a central, easily accessible location.

5. Analyze and Prioritize: Not all lessons will have the same impact. Analyze and prioritize them based on their potential to improve future projects.

6. Develop Action Plans: For each high-priority lesson, develop an action plan to implement it. This should include what needs to change, who will be responsible for the change, and how the change will be implemented.

7. Implement Changes: Put these action plans into practice. This might involve updating standard processes, providing training to staff, or adopting new tools or techniques.

8. Monitor and Review: Monitor the effectiveness of the changes you've made. If they're not leading to improvement, you might need to revise your action plans.

9. Share Lessons Learned: Ensure that the lessons learned are shared with all relevant stakeholders, and especially with new project teams during project initiation.

10. Continual Improvement: Keep in mind that this is a cyclical process. Continually review and update your lessons learned and the changes you've made to keep improving over time.

The key to leveraging lessons learned for continual improvement is to ensure that they are effectively captured, communicated, and implemented. They should not simply be filed away and forgotten, but rather, they should guide decision-making and improvement efforts on future projects..

Reflection

Reflect on two or more projects you recently contributed to.	Project 1	Project 2
R25 Give an example of how you identified quality standards with stakeholders and included a process to manage them in a project plan. *<u>Essential requirements:</u>* *Document a quality-management plan.*	T 2	
R26 Give an example from a project where you successfully identified and managed an issue with *scope quality* during project delivery. Give an example from a different project where you got it wrong! *<u>Essential requirements:</u>* Must be examples from at least two different projects. Challenge them on why they got it right or wrong. *Implement quality **control** and assurance processes for a defined project using a range of tools and methodologies.*		
R27 Give an example from a project where you successfully identified and managed an issue with *process quality* during project delivery. Give an example from a different project where you got it wrong! *<u>Essential requirements:</u>* Must be examples from at least two different projects. Challenge them on why they got it right or wrong.		

*Implement quality control and **assurance** processes for a defined project using a range of tools and methodologies.*		

BSBPMG539 Manage project governance

Performance tasks

T13 Prepare terms of reference for the governance group for a project you are familiar with.

Essential requirements:

All fields must be sufficiently detailed.

Knowledge questions

Q51 What are some of the different ways a project can be governed?

Model answer:

Project governance is a critical aspect of project management. It provides a structured framework for decision-making, ensuring that the project aligns with the organization's strategic objectives and adheres to best practices and standards. Here are some of the ways a project can be governed:

1. Project Steering Committee or Project Board: This is one of the most common forms of project governance. A steering committee or project board is typically made up of senior stakeholders who make key decisions about the project, such as approving changes to scope or budget. They also provide strategic direction and help resolve high-level issues.

2. Project Management Office (PMO): Some organizations establish a Project Management Office to oversee all projects within the organization or a specific department. The PMO typically sets project management standards, ensures consistency across projects, provides training and support to project teams, and monitors the performance of projects.

3. Project Sponsorship: The project sponsor is usually a senior executive who champions the project within the organization. They play a key role in decision-making, stakeholder management, and ensuring the project aligns with strategic goals.

4. Project Manager Role: The project manager plays a key role in project governance, taking responsibility for day-to-day management of the project. This includes tasks like developing and maintaining the project plan, coordinating the project team, managing risks and issues, and reporting on project progress.

5. Project Management Methodologies: Project governance can also be guided by specific methodologies like PRINCE2, PMBOK, Agile, Scrum, etc. These methodologies provide a structured approach to managing projects, with clear roles, processes, and documentation.

6. Governance via Contractual Agreements: In cases where the project involves external contractors or partners, governance can be enforced via contracts, which specify the roles and responsibilities of each party, as well as the standards and processes to be followed.

7. Use of Project Management Tools: Many organizations use project management software to help govern their projects. These tools can help to enforce processes, provide visibility into project progress, and ensure that issues and changes are properly managed.

8. Performance Monitoring & Control: This involves the regular tracking and reporting of project progress to ensure the project is on track to meet its objectives. This can include monitoring tasks, milestones, costs, and risks, and taking corrective action when needed.

9. Risk Management: Good governance includes the proactive management of project risks. This involves identifying, analyzing, mitigating, and monitoring risks throughout the project.

10. Compliance Management: In certain industries, projects need to adhere to specific regulations or standards. In such cases, governance includes ensuring compliance with these requirements.

Different projects and organizations may require different governance structures and practices. The key is to choose a structure that provides clear decision-making processes, aligns the project with strategic objectives, and ensures that the project is managed effectively and responsibly.

Q52 What should you keep in mind when delegating authority to others?

Model answer:

Delegating authority is an important part of leadership and project management. It allows you to distribute work according to expertise, fosters a sense of ownership among team members, and enables you to focus on high-priority tasks. However, delegation must be done thoughtfully and effectively to ensure success. Here are several key considerations:

1. Competence: The person to whom you delegate tasks should have the necessary skills, knowledge, and capabilities to complete them effectively. Be sure to match tasks with the abilities and potential of your team members.

2. Clear Expectations: Clearly define the tasks being delegated, the expected results, and the timelines. Make sure the individual understands what is expected of them, why the task is important, and how it contributes to the overall project.

3. Authority and Responsibility: Make sure that with delegated tasks, you also delegate enough authority for the individual to make decisions and progress independently. However, ensure they understand they are responsible for the outcomes.

4. Support and Resources: Ensure that the person has access to the necessary resources and support to complete the task. This can include tools, information, access to other team members, and your own time for guidance and feedback.

5. Communication: Maintain open lines of communication. Let the person know they can come to you with questions, issues, or for clarification.

6. Progress Tracking: While you need to avoid micromanaging, it's important to have a system in place to track progress and provide feedback. Regular check-ins can be useful for this.

7. Empowerment: Delegation is an opportunity for team members to develop new skills and gain confidence. Allow them to approach the task in their own way, as long as it aligns with the project's goals.

8. Recognition and Feedback: Recognize the efforts and successes of your team members. Provide constructive feedback and reward good work, which will motivate and encourage them for future tasks.

Remember, effective delegation can contribute to a more engaged, productive, and successful team. It's an important skill that every good leader and project manager should develop.

Q53 What does good project governance look like? What impact will it have on a project achieving its objectives?

Model answer:

Good project governance provides a framework for making decisions, allocating resources, and managing risks in a way that ensures the project aligns with its strategic objectives and is delivered effectively. Here's what it might look like:

Key Elements of Good Project Governance

1. Clear Roles and Responsibilities: Good governance starts with clearly defined roles and responsibilities. This helps ensure everyone knows who is responsible for what and reduces ambiguity or confusion.

2. Effective Decision-making Processes: There should be clear, agreed-upon processes for making and communicating decisions. This helps to ensure that decisions are made efficiently and effectively.

3. Accountability: All stakeholders should be accountable for their actions and decisions. This helps to ensure that everyone is committed to the project's success.

4. Transparency: There should be openness and transparency in all project dealings. This helps to build trust and ensures that all stakeholders are well-informed.

5. Risk Management: Effective governance includes the proactive identification, assessment, and management of project risks. This helps to protect the project from potential threats and take advantage of opportunities.

6. Performance Monitoring and Control: Regular monitoring of project progress and performance against established baselines helps to ensure that any issues or deviations are detected and addressed promptly.

7. Stakeholder Engagement: Effective governance involves engaging with all key stakeholders in a timely and appropriate manner. This helps to ensure their needs and expectations are taken into account, and that they are kept informed of project progress.

8. Compliance: Good project governance ensures that the project complies with all relevant laws, regulations, standards, and policies.

Impact of Good Project Governance on Project Objectives

Good project governance helps to ensure that a project is completed on time, within budget, and to the required quality standards, while meeting its stated objectives. Specifically, it can:

1. Increase Efficiency: By providing a framework for decision-making and problem-solving, governance can help to streamline project processes and increase efficiency.

2. Reduce Risk: Effective risk management can help to mitigate potential threats to the project and reduce uncertainty.

3. Improve Quality: By enforcing standards and best practices, governance can help to improve the quality of project outputs.

4. Increase Stakeholder Satisfaction: By ensuring transparency and accountability, and by effectively managing stakeholder expectations, governance can lead to increased stakeholder satisfaction.

5. Improve Outcomes: Ultimately, all of the above can lead to better project outcomes, with the project more likely to achieve its stated objectives.

In summary, good project governance provides a structured, systematic approach to managing a project, leading to improved efficiency, reduced risk, increased stakeholder satisfaction, and better project outcomes.

Q54 When and how should you provide feedback to the organisation on how your project is being governed?

Model answer:

Feedback on project governance should be provided regularly and at key stages of the project lifecycle to ensure that governance issues are identified and addressed promptly. This helps to improve decision-making, increase efficiency, manage risk, and ultimately enhance project outcomes.

When to Provide Feedback

1. Project Initiation: As soon as the project is initiated, you can begin to provide feedback on how well the governance structure is working in terms of defining roles, setting up decision-making processes, and establishing communication channels.

2. Project Planning and Execution: During these stages, feedback should be provided regularly, either during project status meetings or through formal reports. This feedback can include updates on project progress, issues, and risks, as well as any governance-related challenges or successes.

3. Project Milestones: At each key milestone, a more comprehensive review of project governance can be undertaken. This could involve assessing how well the governance structure is supporting the project, whether decisions are being made effectively, and whether any changes to governance are needed.

4. Project Completion: At the end of the project, a full review of project governance should be conducted as part of the project post-mortem or lessons learned process. This can help to identify any improvements that can be made for future projects.

How to Provide Feedback

1. Formal Reporting: Regular project status reports should include a section on governance, highlighting any issues or successes, and suggesting any improvements.

2. Meetings: Regular project meetings, such as steering committee meetings or project team meetings, can be used to discuss governance issues and share feedback.

3. Surveys or Questionnaires: These can be used to gather feedback from project team members and other stakeholders on their perceptions of project governance.

4. Interviews or Focus Groups: These can provide more in-depth feedback on project governance. They can be particularly useful at the end of the project, as part of the lessons learned process.

5. Lessons Learned or Post-Mortem Reviews: These reviews should include a thorough assessment of project governance, identifying what worked well, what didn't, and what can be improved for future projects.

Providing feedback on project governance is a crucial part of continuous improvement. It helps to ensure that the governance structure and processes are effective, and that they support the successful delivery of the project.

Q55 Give an example from your own experience how you monitored and evaluated the governance of a project.

Model answer:

The answer provided will be dependent on the student's own experience.

Reflection

The is no reflection interview for this unit.

BSBPMG540 Manage project integration

Performance tasks

T14 In this final assessment task, you must identify a complex public or private project that has recently been completed and conduct a comprehensive review of its performance.

Essential requirements:

Minimum 2,000 words, with all fields sufficiently detailed.

Knowledge questions

Q56 What advice would you give to an organisation looking to establish a governance structure for a project?

Model answer:

Establishing a solid governance structure is a key part of successful project management. Project governance ensures that projects are run in a way that is transparent, efficient, and accountable, and aligns with the strategic objectives of the organisation. Here is some advice for an organisation looking to establish a governance structure for a project:

1. Define Roles and Responsibilities: Clearly define who is involved in the governance process and what their roles are. This typically includes project sponsors, the project manager, the project team, and other stakeholders. Each role should have a clear understanding of their responsibilities and authority.

2. Align with Strategic Goals: Ensure that the project governance aligns with the strategic objectives and goals of the organisation. The project should contribute to the wider organisational strategy, and the governance structure should facilitate this alignment.

3. Establish Decision-Making Processes: Clearly define how decisions will be made within the project. This includes who has the authority to make decisions, how decisions are communicated, and how disagreements or conflicts are resolved.

4. Define Communication Channels: Establish clear lines of communication for all stakeholders involved in the project. This includes regular meetings, reporting structures, and escalation paths for issues.

5. Set up Project Controls: Establish clear control mechanisms such as milestones, checkpoints, and performance metrics to measure the progress of the project. This will ensure that the project stays on track and aligns with the governance structure.

6. Develop Risk Management Processes: Establish processes to identify, assess, manage, and monitor risks associated with the project. This should be an ongoing process throughout the project.

7. Implement Change Management Processes: It's likely that changes will occur throughout the project. Define processes to manage these changes in a controlled and structured manner.

8. Ensure Accountability: Make sure each role within the project governance structure is held accountable for their responsibilities. This can be done through regular performance reviews, audits, and feedback.

9. Plan for Continual Improvement: No governance structure is perfect from the start. Plan to review and improve the governance structure on a regular basis.

10. Provide Training and Support: Make sure everyone involved in the project understands the governance structure and their role within it. Provide training and support as needed.

Remember, project governance is not a one-size-fits-all approach. The governance structure should be tailored to fit the size, complexity, and risk level of the project, as well as the culture and structure of the organisation.

Q57 What project documents should be updated after a change request is approved?

Model answer:

Once a change request has been approved, several project documents may need to be updated to reflect the changes, depending on the nature and impact of the change. Here are some key project documents that might require updates:

1. Project Management Plan: This document outlines the entire plan for executing, monitoring, and controlling the project. Changes that impact the project's objectives, scope, cost, schedule, or quality will require updates to this document.

2. Project Schedule: If the change affects the project's timeline, tasks, or milestones, it would require an update to the project schedule.

3. Project Budget or Cost Baseline: Any changes that impact the project's costs will necessitate an update to the budget or cost baseline.

4. Scope Statement and Work Breakdown Structure (WBS): If the change request alters the project's scope, both the scope statement and the WBS need to be updated to reflect the new scope.

5. Quality Management Plan: If the change affects quality requirements, the Quality Management Plan would need to be revised.

6. Risk Management Plan: Changes might introduce new risks or alter existing ones, thus requiring an update to the Risk Management Plan and Risk Register.

7. Resource Management Plan: If the change has an impact on resource allocation or utilization, the Resource Management Plan may need an update.

8. Stakeholder Management Plan: If the change alters how stakeholders are affected by or involved in the project, updates may be needed to the Stakeholder Management Plan.

9. Communications Management Plan: Major changes might necessitate adjustments in how, when, and what is communicated to stakeholders, so the Communications Management Plan might need updating.

10. Procurement Management Plan: If the change involves contractual aspects or changes in procurement needs, the Procurement Management Plan and possibly actual contracts might need updating.

After the relevant documents are updated, it's important to communicate the changes to all relevant stakeholders to ensure everyone understands the new direction and how it affects

the project. The approved change request should also be logged in a Change Log to maintain a record of all changes made during the project.

Q58 Briefly describe the purpose and function of a project change register and a project issues log.

Model answer:

A Project Change Register and a Project Issues Log are both essential tools for managing and documenting key aspects of a project's progression. Here's what they do:

Project Change Register (or Change Log)

Purpose: The Change Register is a document used to track any changes that occur during the life of a project. These changes may relate to project scope, cost, schedule, resources, or any other aspect of the project.

Function: The Change Register records and tracks details of all change requests throughout the project. This includes the description of the change, the person who requested the change, the date it was requested, the decision on the change (approved, rejected, or deferred), the impact of the change on the project (cost, time, scope), and the status of the change implementation. This tool helps maintain transparency, ensures changes are properly evaluated and controlled, and provides a history of how the project has evolved over time.

Project Issues Log

Purpose: The Issues Log is used to document and track all issues that arise during the project. An issue is an event or situation that has actually occurred and is affecting the project negatively in some way, as opposed to risks, which are potential future issues.

Function: The Issues Log records details about each issue including a description of the issue, the person who reported the issue, the date it was reported, the severity of the issue, the assigned person to address the issue, actions taken to resolve the issue, and the final resolution or outcome. It provides a structured way of monitoring issues, ensuring they're addressed, and understanding their impact on the project.

Both the Change Register and the Issues Log are crucial for effective project management as they aid in maintaining project control, ensuring transparency, and facilitating communication amongst project stakeholders.

Q59 Detail the process of handing over the final project deliverable to a client.

Model answer:

Handing over the final project deliverables to a client is a critical stage in the project life cycle. It signifies the completion of the project and transitions the project's products or services from the project team to the client or end user. Here's a step-by-step process:

1. Final Review and Quality Assurance: Before handing over the deliverables, perform a final quality check to ensure they meet all project requirements, standards, and client expectations. Address any defects or issues identified during this review.

2. Prepare the Deliverables: Package the deliverables in a format that is convenient and accessible for the client. This could be anything from a physical product, software, a report, or any other output the project was designed to produce.

3. Client Notification: Notify the client that the project deliverables are ready for handover. Schedule a handover meeting or event, and ensure all the necessary parties are invited.

4. Handover Meeting: During the handover meeting, present the final deliverables to the client, demonstrate their use if necessary, and provide any relevant instructions or documentation.

5. Documentation: Provide the client with all relevant documentation. This may include user manuals, technical documents, project reports, maintenance guides, warranties, etc.

6. Training: If the project deliverables require specific skills or knowledge for use, you might need to provide training to the client or end users.

7. Obtain Sign-off: Obtain formal sign-off from the client, indicating that they have accepted the deliverables. This is usually done by having the client sign a document known as a project completion form or project acceptance form.

8. Provide Support and Contact Information: Give the client information on who to contact for support or if they have questions or issues after the project has ended.

9. Transfer of Control: Officially transfer control of the deliverables to the client.

10. Post-project Review: After the handover, hold a post-project review or "lessons learned" meeting with your team to discuss what went well and what could be improved for future projects.

Remember, each project is unique, so this process may need to be tailored to fit the specific requirements of your project and organization. Open and clear communication with the client throughout this process is crucial to ensure a smooth and successful handover.

Q60 What is a project lessons learned register? How and when should it be used?

Model answer:

A Project Lessons Learned Register is a document that is used to record the knowledge gained during a project. This includes both positive experiences—what went well, and should be repeated in future projects—as well as negative experiences—what didn't go well, and should be avoided or improved in future projects.

The Lessons Learned Register can cover a wide range of areas, including project management practices, technical design and execution, team collaboration, stakeholder management, resource management, risk management, and more.

Here's how and when it should be used:

How to Use a Lessons Learned Register

1. Recording: Throughout the project, encourage all team members to record their insights and experiences in the register. This can be done in a structured format (e.g., what the lesson is, the context in which it was learned, the impact, and the recommended action), or more informally.

2. Discussion: Regularly (e.g., at the end of project phases or significant milestones) discuss the lessons learned as a team. This can help to clarify and consolidate the lessons, and ensure that everyone has a shared understanding.

3. Action Planning: For each significant lesson, develop an action plan for how the lesson can be applied in future. This may involve changes to processes, behaviors, tools, etc.

4. Sharing: At the end of the project, or at key transition points, share the Lessons Learned Register with relevant stakeholders. This can include other project teams, senior management, or any others who could benefit from the knowledge.

When to Use a Lessons Learned Register

1. During the Project: It's essential to record and discuss lessons learned throughout the project, not just at the end. This allows you to improve your processes and practices as you go along, rather than waiting until the project is over.

2. At the End of the Project: Conduct a final lessons learned session, and update the register with any final insights.

3. Before Future Projects: Before starting a new project, review the Lessons Learned Register from previous similar projects to identify any insights that could be applied.

Remember, a Lessons Learned Register is only useful if it's actively used. Encourage your team to engage with it regularly, and ensure that the lessons it contains are actually applied in practice. This can help to drive continuous improvement, and increase the success of your projects.

Reflection

Reflect on two or more projects you recently contributed to.	Project 1	Project 2	Project 3
Certification interview – see the relevant Certification assessment guide. *<u>Essential requirements:</u>* Upload project experience to OPEN. Candidates must reference at least two different projects to the one submitted in the reflection. *Work closely with others to integrate all project management functions across a project life cycle according to organisational objectives.* *Make suggestions for improvements to managing project integration in the future.* *Maintain established links to align project objectives with organisational objectives.*	T 14		