**Week five lecture:**

**Project Integration Management**

In the past few months, Ashley has been busy implementing the project and ensuring that the project runs smoothly. She has defined reporting mechanisms to communicate performance to various stakeholders. She has also instituted performance review meetings, design and performance reviews, reports, and a variety of analytic efforts to ensure that she quickly knows when something is amiss.

Ashley monitors the milestones for the various elements of the plan. She requires that team members approaching a milestone inform her beforehand about problems, if any. She also requires that all team members update central project logs and notebooks. So far, the project has been moving slightly ahead of schedule.

Next month, the project team would begin some of the early testing and continue with the development work to bring the CRM software online. However, recently, Ashley has started seeing some difficulties, which she decides to discuss with Mat. Mat has just returned from his annual camping trip to Pennsylvania's mountains.

The first supplemental media piece reports that Ashley's project is facing change control issues. It is important that Ashley establish a process to manage and control change before the undocumented changes begin to impact the project schedule and cost. To do this, she needs to implement a change control process.

This brings us to the last integration management process to be implemented during the project execution phase—perform integrated change control.

Perform integrated change control is the process of reviewing all change requests, approving changes, and managing changes to deliverables, organizational process assets, project documents, and the project management plan (PMI, 2008).

Overall change control is a primary activity during the execution phase of any project. The goal is to retain control of revisions to scope, schedule, costs, staffing, requirements, and specifications, to name a few. To accomplish this, most organizations elect to charter a change control board, whose job is to review proposed changes (beyond those approved by the project plan) to any of the listed areas. Best practices for such a control board include having approved forms and formats, documenting and reviewing all proposed changes, convening the board at intervals, documenting board decisions, and publishing changes to the plan, as necessary. The goal of overall change control is not to ban changes but merely to control and manage changes to reduce turbulence in a project. A project manager needs to be acutely sensitive to resistance to change and should work to take action before resistance starts.

Ashley's project is in its final phase. She has managed to put a firm check on the undocumented changes that were threatening to put the project behind schedule and over budget.

To her surprise, Herb's improved behavior continued after Raj's return. The meeting with the Property and Casualty team resulted in an agreement to free up server space and the need to buy a new server was placed on hold until the implementation of the CRM system moved forward. Ashley believed that Swedberg would eventually have to buy an additional server, or possibly two, as the future build-out of the system integrated the Internet. But, for now, this was a good solution that allowed the project to continue on track.

This coming week, Ashley is expected to begin closing out the CRM project and she is pleased.

**Conversation attached**

## ****Scope Verification and Closeout****

After the project scope has been verified, accepted, and confirmed, the stage is set for project closure or phase closure. According to the Project Management Institute (PMI; 2008), it is important to ensure that project closure activities are not delayed until the closeout phase of the project or phase. These activities should be performed throughout the life cycle of the project and should be guided by the project management plan. This facilitates the actions at the end of the project.

Closeout involves documenting project results, capturing lessons learned, releasing team members and providing feedback on their performance, and scheduling the after implementation review (PMI, 2000). Contracts should also be closed and audited during project closeout.

Project closure also includes identifying when the work was done satisfactorily to meet the exit criteria for the project or phase. When these criteria (which should be reflected in the project management plan) are met, the closeout activities involve transfer of project results to the next phase or to the user.

Projects do not always succeed. Sometimes, circumstances, risks, or management decisions result in project termination. In such cases, the project manager should conduct all project closure activities so as to retain an accurate record of the risks, the lessons learned, the audit results, and other data so that the project can be reviewed later (PMI, 2008).

**Releasing Resources**  
Project team members should be released from the project in a timely and efficient manner. As the workload diminishes, the project manager should balance the needs of the project against the need to keep project costs down by releasing team members back to their usual jobs. In addition, the project manager must provide performance feedback to each team member and his or her direct supervisor. Only then can project team members be adequately commended for a job well-done.

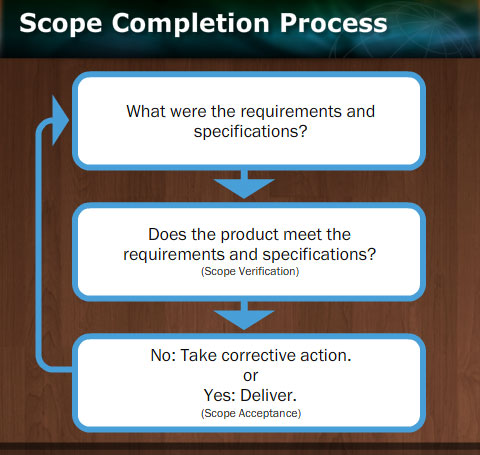
**Archiving Files**  
Identifying the files to be archived and placing them in a logical sequence is an area of project management that is often overlooked. Many future projects can benefit from complete records of successes and failures of earlier projects. A project manager should insist on accurate and complete documentation throughout the project so as to minimize the difficulty of documentation at the end of the project and should include the project results in the project closure documents (PMI, 2008). The project management plan should reflect which documents will be archived and how the lessons learned will be collected, documented, and archived for future use.

In her conversation with Raj, notice that Ashley wants to conduct a formal scope completion before moving on to project closure activities.

Scope completion signals the end of project execution. The supplemental media includes a graphical representation of the scope completion process:

Scope verification means that the customer agrees that the work has been done, while scope acceptance means that the customer has "signed off" the product and that the project has met the desired outcomes. When the customer has accepted the project's scope, the project may proceed with the remainder of closeout actions.

### **Additional Materials**



## ****Implementation Review****

Project managers benefit from the lessons learned documented by other project managers. Project closeout should include a thoughtful review of the activities that went well and those that did not. While documenting the lessons learned during the project, attention should be paid to the risks encountered and the responses to those risks. In addition, risks that were planned for but did not occur should be reviewed and appropriate comments regarding the validity of the risk plan should be included in the lessons-learned file. Other historical information related to the project should be collected and archived to allow a complete understanding of the lessons learned during the project.

After Implementation Review  
The project manager should schedule an after implementation review within 90–180 days after project completion. This review should be planned to cover all areas of the project, specifically the following:

* Scope
* Time
* Cost
* Quality
* Human resources
* Risk
* Communications
* Procurement

A detailed review of project performance in each of these areas will bring out the exact picture of the project's success.

With the successful closure of the CRM project, Ashley found time to do what she resolved to do at the start of the year—getting a Project Management Professional (PMP®) certification (a credential for highly skilled project managers who have enterprise-level responsibilities and must be skilled in managing multiple, strategic projects). She knew that the PMP® certification is critical for employment in the twenty-first century. Many project managers have already taken the examination, and she didn't want to be left behind.

Ashley dug out the books for the PMP® examination and studied them in her spare time. She had put the application together and submitted it as a way to force herself to buckle down, and it had worked. She knew that as a college graduate, she needed four thousand five hundred hours of project management time over a three-year period to be eligible to sit for the examination. Initially, she had been worried about meeting this criterion, as the hours seemed like a lot, but then, she figured out that she had worked well over two thousand hours a year and almost all of those in doing projects. So she plowed through the application, listing her projects and splitting the hours into the five process groups—initiating, planning, executing, monitoring and controlling, and closing. This effort took her a couple of weeks, and then, she sweated it out for another week to get approval to take the examination.

To prepare for the examination, Ashley created a study plan for herself and stuck to it. She took practice tests until she was routinely scoring well above 80 percent. Finally, steeling herself, she went to the testing center and took the examination. Four hours and two hundred questions later, she emerged a PMP®.

Besides the PMP® certification, there are several other certifications available from the PMI. If you are not yet ready to pursue the PMP® certification (perhaps you need to amass more project management work experience), then the Certified Associate in Project Management (CAPM®) certification might be a good choice. The CAPM® certification is a less rigorous credential aimed at entry-level workers in the project management arena. This certification expires after five years and can be renewed by retaking the CAPM® examination. Project managers who are assigned higher-level responsibilities might also want to consider the PMI Scheduling Professional (PMI-SP®) and PMI Risk Management Professional (PMI-RMP®) certifications. These potential certifications are for those project management specialists who work primarily in areas of scheduling and risk management.