



incl.
**project
management**
templates

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Project Management (IPMA®)

Study Guide for Level D and Basic Certificate (GPM)



Steinbeis-Transferzentrum
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1 Competence Area: Perspective



1.1 CE Strategy (4.3.1)

Every company should phrase a strategy about how to pursue their vision and how to reach their goals – and act accordingly. Strategy is considered goal-oriented in terms of long-term, global, environmental, and/or development-oriented aspects. The tasks of strategic management are as follows:

- to build competences for achievement of the objectives,
- to find a beneficial market position (compared to competitors),
- to behave sustainably.

Planning a company's strategy is all about defining and implementing strategic goals based on the company's mission and vision.

Mission:

»Assignment or purpose of a company or organization to a certain action or to achieve a goal. Deals with the question: What are we here for? What is our mission?« (Motzel)



Vision:

»Clearly described imagination and desire for the future, serves as an orientation for all actions and decisions. It should create a positively motivated state and provide a direction with which the people of the organization can identify.« (Motzel)

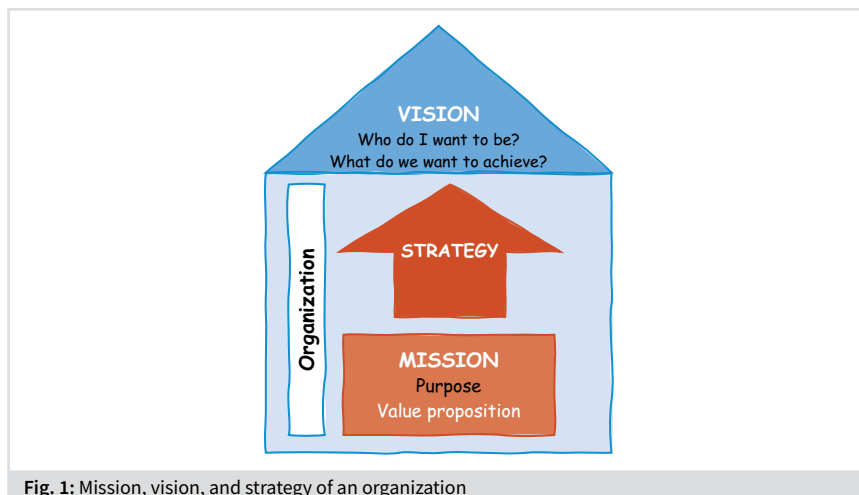


Fig. 1: Mission, vision, and strategy of an organization



Strategy:

»Basic, long-term, and documented behavior (combination of measures) planned to achieve the vision based on the mission.« (Motzel)

The projects of a company should follow its strategy and be aligned with it. If projects are contrary to these strategic management elements of an organization, a so-called value-destroying complexity arises. The top management of the company is responsible for making sure that the projects and the strategy are aligned and compatible with each other.

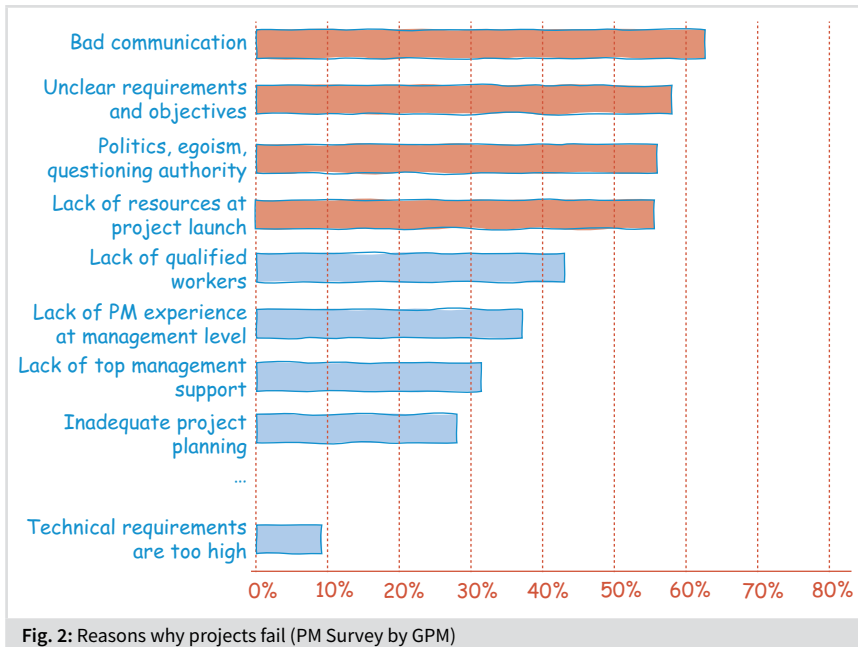
Examples:

- An automotive company that has been manufacturing only cars should carefully consider whether adding motorcycles to its product portfolio is beneficial and aligns with the strategy of the company.
- If a pacifist consulting firm receives an order from a defense business, the organization should make a strategically conscious decision for or against this order.

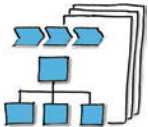
The consistency of the strategy of a project with that of the company can be checked with the following questions:

- Are the **success factors** (see chap. 3.2.8.8) of a project supported by the strategy of the company?
- Which factors of the **project environment** (see chap. 3.2.5.1) have their origins in the strategy of the company? Are there contradictions between the project's context factors and the company's strategy?
- Is the **business case** (see chap. 3.1.1, Tab. 2) in line with the strategy of the company?

According to a survey of the GPM (2007), the following factors are reasons projects are not successful:



If you turn around these failure factors, they become success factors, which are also referred to as the **standard** or **key success factors** (see chap. 3.2.8.8) of a project.



1.2 CE Governance, Structure, and Processes (4.3.2)

1.2.1 Definition: Project

Basic

In everyday usage, projects are omnipresent. Typically, cleaning up the garage, learning how to play an instrument, or engaging in charity are all commonly referred to as ›projects‹. But are all of these *real* projects?

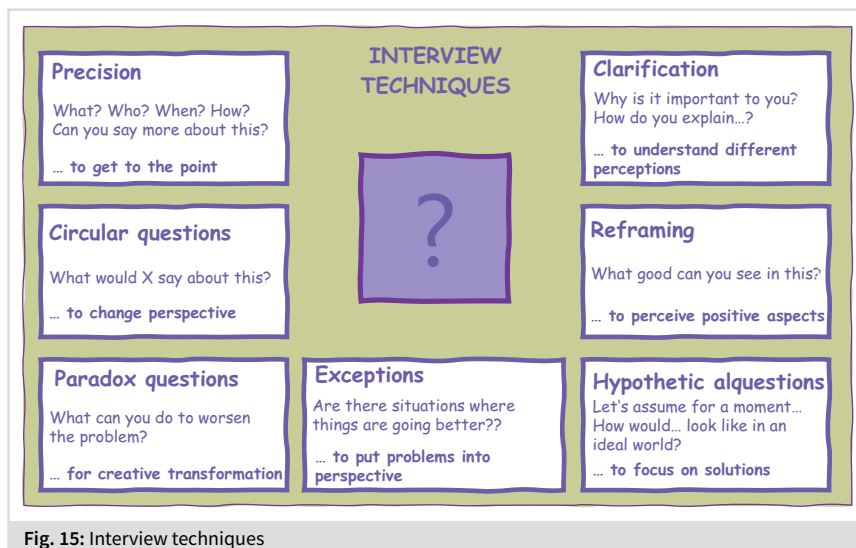
The ›project‹, as defined by the ICB4, carries certain properties which clearly distinguish it from a mere task. For the ›real‹ projects defined here, the ICB4 provides a guideline on how to make them successful. For tasks, to follow these standards would mean unnecessary overhead.

2.3.4 The Art of Asking: Interview Techniques

Techniques for asking questions are an important element of dialogue. Note that there is a difference between dialogue and discussion:

- A **discussion** is usually between parties with different interests with the purpose of each party's enforcing his or her position or to bring about a decision in his or her own favor. Accordingly, the rules for meetings should apply, as, for example, thorough moderating, following a schedule or an agenda, taking minutes, and the like.
- A **dialogue** is an exchange at eye level. The focus is on understanding the other person or party. New ideas are produced together. Accordingly, the location, organization, and questioning techniques should be designed to foster a dialogue: a bright and pleasant room, no time pressure or results orientation.

Interview techniques support the creative aspect of a dialogue. They open perspectives, help to find and phrase options for decisions, and support acting in a solution-oriented way.



2.3.5 Feedback

Basic

Feedback should be considered a gift through which the recipient can gain valuable insights and thereby adapt his or her behavior. Behavioral changes are more easily implemented through insight and benefit recognition. It is therefore important that

3 Competence Area: Practice

This entire chapter follows the general phase model of project management and the course of a project. It is thus not consistently sorted by CEs. In individual chapters, the CE number is assigned for reference.

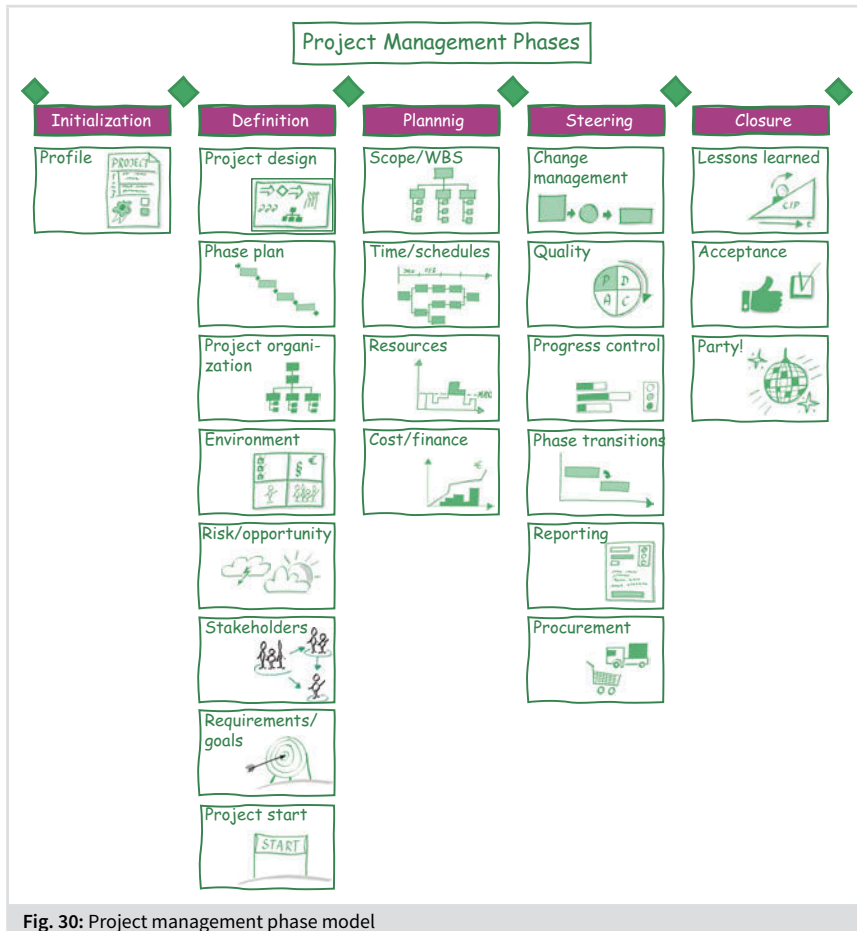


Fig. 30: Project management phase model



3.1 Initialization

Basic

Start:

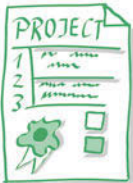
- Initial thoughts for an endeavor are phrased and exchanged in order to sharpen the idea.
- There is a necessity to do something (e.g., due to a strategic decision, a new law, or the like).

Focus:

- Information is collected and evaluated to decide whether a project shall be started or not.
- A business case may be created to investigate the economic impact of the project.
- The project character is assessed – maybe it is only a task.
- A project sponsor/client and a responsible person to compile the key data (if applicable, the future project manager) is found.
- Initial information (project profile) is documented, and commitment with the project sponsor is achieved.

Results:

- A decision is made whether or not to start the project.
- First funds are released so that the next steps can be taken in the definition phase.
- A feasibility study may be commissioned to further specify the project order.
- The project may be cancelled by the client/sponsor if the business case has proven to be unsuccessful.



3.1.1 Documents in the Initialization and Definition Phase

At the beginning of the project there is little information available about the project's content and environment. Much is still inaccurate and is only sharpened through discussions and initial clarification work. For this reason, the initiators of the project create documents with only a low level of detail which capture initial thoughts and thus provide the basis for further decisions (see chap. 3.2.3 Project start).



Project profile [Ger. Projektsteckbrief]:

Basic

»Summary of the project definition on one page. In addition to information on the scope of services, it can also contain initial budget estimates, a list of team members, or information on the project environment. It contains the most important key data for the project and is continuously supplemented and revised during the initialization phase. With the project profile, initial funds can be released for initialization and definition of the project, even if hardly any project data is known at the start of the initialization phase. At the end of the definition phase, a project proposal and, with approval, a project order can be created (a signature block may be required). In the following project management phases, this document is continuously updated with new key data of the project which arise due to change requests (cost-date performance, risks, etc.).«
(Motzel)

**Business case [Ger. Business case]**

»Business transaction with proof of the eligibility, objectives, benefits, and economic efficiency or profitability of a project. This proof is usually developed during project definition, continuously reviewed during project selection, and evaluated at the end of the project. The business case is based on the company or business unit strategy and project selection and includes the success and long-term consequences of a project.« (Motzel)

Business Case			
Project name			
Project sponsor		Project manager	
Date of project approval		Last revision date	
Contribution to business strategy of company			
Options considered	<input type="checkbox"/> Make decision <input type="checkbox"/> Buy decision Explanatory statement:		
Benefits for client/sponsor/company			
Intended timeline	Project start: Important milestones: Project closure:		
Expected Costs	Staff: Material: Others: Total:		
Expected Return on Investment (ROI)	Year 1: Year 2: Year 3: Year ...: Break-even in year:		
Main Risks			

Tab. 3: Example of a business case form