Putting the “PMBOK” into Project Management
A top-tier consulting firm's approach

October 9, 2012
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Your speaker

Rachel Medrano, PMP
Senior Manager
Consulting Methods & Tools
Deloitte Consulting LLP
Costa Mesa, CA

• More than 13 years project management and business transformation experience
• Method & Tools Coach 2009 – 2012, now a Methods Product Manager
• Serving clients in multiple industries, including Energy, Consumer Products, High Technology, and Public Sector.
• PMP since 2007
• VP on PMI-LA Board of Directors 2011
Background
Deloitte Overview

Deloitte provides audit, tax, consulting, and financial advisory services to public and private clients spanning multiple industries. With a globally connected network of member firms in more than 150 countries, Deloitte brings world-class capabilities and high-quality service to clients, delivering the insights they need to address their most complex business challenges. Deloitte’s approximately 182,000 professionals are committed to becoming the standard of excellence.

Approximately 182,000 professionals representing 47 member firms with operations in more than 150 locations

Clients include 78% of the FORTUNE 2011 Global 500 companies

Aggregate revenues of $28.8 billion for the year ending May 31, 2011
Definitions

**Framework (noun):** a skeletal structure designed to support or enclose something.
- Conceptual framework: a set of theories widely accepted enough to serve as the guiding principles of research within a particular discipline

**Approach (noun):** the method used or steps taken in setting about a task, problem, etc.
- “We need a whole new approach to the job.”

**Methodology (noun):** a set or system of methods, principles, and rules for regulating a given discipline, as in the arts or sciences.

**Method (noun):** a procedure, technique, or way of doing something, especially in accordance with a definite plan:
- “There are three possible methods of repairing this motor.”

*Source: www.dictionary.com*
Top 10 PMO worst practices

1. The PMO playing “Methodology Cop”
2. Implementing a methodology without a framework
3. Not implementing a methodology
4. Not matching demand to supply
5. Not logging time
6. Gathering unnecessary information
7. Keeping an ad-hoc project request process
8. Lack of executive support
9. Implementing a tool without a process
10. Implementing a process without a tool

This presentation will address the first three items, and will touch on the last two
Business imperatives

The marketplace is driving the need for well-established, scalable project management capabilities

**Primary drivers**
- Expanding project scale and scope
- Increasing risks and rewards
- Growing resource and geographic complexities

**Contributing factors**
- Maturation of project and portfolio management (PPM) tools
- Budget constraints
- Global competition
- Industry credential expectations (e.g., PMI and CMMI)
- Focus on quality improvement

Scale, risk, and complexity can be addressed by mature project management capabilities
Project management method roadmap

Deloitte used a five-step process to design, develop, and implement a framework-driven project management (PM) method.
Step 1: Framework selection

Framework landscape

Many project management and quality-based frameworks have emerged in the marketplace over the past 25-30 years.
Deloitte’s chosen frameworks

Deloitte’s Project Management method content is aligned with the Project Management Institute's (PMI's) Project Management Body of Knowledge (PMBOK) and the Software Engineering Institute’s (SEI’s) Capability Maturity Model Integration (CMMI).

- Same terminology
- Same scope

- Align with select process area definitions
- Leverage select leading practices
Framework usage

There are several different approaches an organization can take to adopt a framework in their project management method or approach:

Little to no framework alignment
- Flexible
- Fully tailored
- Highly subjective
- Reinvent industry standards

Leverage framework leading practices, interpret as needed
+ Based on recognized practices and standards
+ Aligned to organization’s needs
- Some subjectivity
- High degree of rationalization required

Direct framework adoption
+ Recognized practices and standards
+ Requires little to no rationalization
- May be misaligned with the organization’s needs or culture
- Typically viewed as overhead / shelf-ware
Framework usage considerations

Putting the PMBOK framework into your organization’s PM method or approach involves three challenging activities:

• **Select the appropriate framework(s)**
  – Find the framework(s) that meets the organization’s goals
  – Understand what the selected framework(s) provide and require

• **Translate the framework(s)**
  – Translate the framework into a structure that works for the organization
  – Rationalize the framework to improve usability without losing its purpose
  – Enhance the framework with organization leading practices

• **Implement and support the framework-based solution**
  – Integrate the framework into the methods, standards, tools, and training provided to users
  – Provide the required sponsorship, change agents, and coaching to achieve adoption
  – Train, champion, adopt… and continuously improve
Step 2: Design Method Architecture

1. Select Framework(s)
2. Design Method Architecture
3. Design Method Tasks
4. Refine Method Content
5. Implement and Support Method
Method architecture

Each Deloitte method adheres to the structure below:

<table>
<thead>
<tr>
<th>Definitions</th>
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</thead>
<tbody>
<tr>
<td>Phase</td>
</tr>
<tr>
<td>• A stage in the project life cycle. The number and names of phases will vary from one method to another</td>
</tr>
<tr>
<td>Pathway</td>
</tr>
<tr>
<td>• Logical groupings of tasks and work products into delivery work streams</td>
</tr>
<tr>
<td>Discipline</td>
</tr>
<tr>
<td>• A high-level grouping of related tasks across phases</td>
</tr>
<tr>
<td>• Focuses on what is being done, rather than who is doing it or who is supplying resources</td>
</tr>
<tr>
<td>Subdiscipline</td>
</tr>
<tr>
<td>• The subdivision of a discipline into a grouping of closely related tasks performed across the phases</td>
</tr>
<tr>
<td>Task</td>
</tr>
<tr>
<td>• Lowest level in the work breakdown structure for a method</td>
</tr>
<tr>
<td>• The majority of method content can be accessed from the task (e.g., objective, steps, inputs, key considerations, work products, roles, guidance)</td>
</tr>
<tr>
<td>Step</td>
</tr>
<tr>
<td>• A list of instructions for creating the work products for each task (optional)</td>
</tr>
<tr>
<td>Work product</td>
</tr>
<tr>
<td>• The end result of each task. Tasks produces one work product, of which there are three types: deliverable, outcome, and artifact. Samples and templates are attached to each work product</td>
</tr>
<tr>
<td>Job Role</td>
</tr>
<tr>
<td>• Standard project roles defined by the method</td>
</tr>
<tr>
<td>• Mapped at the task level</td>
</tr>
<tr>
<td>Development Aids</td>
</tr>
<tr>
<td>• Includes detailed procedures, tools, and accelerators</td>
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</tbody>
</table>
Design method architecture

Key questions:
- How does the organization perform project management?
- How do PM processes integrate with project life cycle?

PMBOK Process Group Model

Deloitte Project and Integration Management (PIM) Method architecture
Step 3: Design Method Tasks

1. Select Framework(s)
2. Design Method Architecture
3. Design Method Tasks
4. Refine Method Content
5. Implement and Support Method
### Design method tasks

**PMBOK Fourth Edition**  
(42 management processes)

<table>
<thead>
<tr>
<th>PM discipline (23 tasks)</th>
<th>QM discipline (10 tasks)</th>
</tr>
</thead>
</table>

**Key questions:**  
- How should the processes and deliverables be combined?  
- When should they be subdivided?  
- When should they be moved into other disciplines?
### PIM Framework (33 Tasks Total) ↔ PMBOK Mapping

<table>
<thead>
<tr>
<th>Initial Phase</th>
<th>All Phases</th>
<th>Final Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Plan</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Develop Project Charter&lt;sup&gt;LS&lt;/sup&gt;</td>
<td>- Complete Deliverables Log&lt;sup&gt;S&lt;/sup&gt;</td>
<td></td>
</tr>
<tr>
<td>- Develop Project Management Plan&lt;sup&gt;LS,H,Cm,R,P&lt;/sup&gt;</td>
<td>- Develop Work Plan&lt;sup&gt;T&lt;/sup&gt;</td>
<td></td>
</tr>
<tr>
<td>- Develop Master Plan&lt;sup&gt;T&lt;/sup&gt;</td>
<td>- Acquire Project Team&lt;sup&gt;H&lt;/sup&gt;</td>
<td></td>
</tr>
<tr>
<td>- Establish Budget&lt;sup&gt;Co&lt;/sup&gt;</td>
<td>- Install and Configure Tools&lt;sup&gt;I&lt;/sup&gt;</td>
<td></td>
</tr>
<tr>
<td>- Establish Supplier Agreement&lt;sup&gt;P&lt;/sup&gt;</td>
<td>- Train Project Staff&lt;sup&gt;H&lt;/sup&gt;</td>
<td></td>
</tr>
<tr>
<td><strong>Manage</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Manage Project Staff&lt;sup&gt;H&lt;/sup&gt;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Manage Risks&lt;sup&gt;R&lt;/sup&gt;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Manage Issues&lt;sup&gt;I&lt;/sup&gt;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Manage Action Items&lt;sup&gt;I&lt;/sup&gt;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Manage Decisions&lt;sup&gt;I&lt;/sup&gt;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Manage Change Requests&lt;sup&gt;LS&lt;/sup&gt;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Manage Work Plan&lt;sup&gt;T,Co&lt;/sup&gt;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Manage Budget&lt;sup&gt;Co&lt;/sup&gt;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Perform Deliverable Acceptance&lt;sup&gt;S&lt;/sup&gt;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Manage Project Status&lt;sup&gt;LS,Cm&lt;/sup&gt;</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| **Close**     |             |             |
| - Perform Phase-end Review<sup>I</sup> | - Close Work Plan<sup>T</sup> | - Close Project<sup>I</sup> |

<table>
<thead>
<tr>
<th>Quality Planning</th>
<th>Quality Assurance</th>
<th>Quality Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Develop Quality Management Plan&lt;sup&gt;Q&lt;/sup&gt;</td>
<td>- Tailor Method&lt;sup&gt;Q&lt;/sup&gt;</td>
<td>- Perform Project Reviews</td>
</tr>
<tr>
<td>- Develop Configuration Management Plan&lt;sup&gt;I&lt;/sup&gt;</td>
<td>- Perform Quality Assessment&lt;sup&gt;Q&lt;/sup&gt;</td>
<td>- Perform Method Coaching</td>
</tr>
<tr>
<td>- Establish Configuration Management&lt;sup&gt;I&lt;/sup&gt;</td>
<td>- Perform Configuration Management Assessment&lt;sup&gt;I&lt;/sup&gt;</td>
<td>- Perform Specialist Support</td>
</tr>
</tbody>
</table>

Legend:
- I: Integration Mgmt
- S: Scope Mgmt
- T: Time Mgmt
- Co: Cost Mgmt
- Cm: Comm Mgmt
- P: Procurement Mgmt
- Q: Quality Mgmt
- H: HR Mgmt

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## PMBOK Mapping Example: Project Time Management

### Sub-Disciplines / Phase

<table>
<thead>
<tr>
<th>Sub-Disciplines / Phase</th>
<th>Initial Phase</th>
<th>All Phases</th>
<th>Final Phase</th>
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<tbody>
<tr>
<td>Plan</td>
<td>Develop Master Plan</td>
<td>Develop Work Plan</td>
<td></td>
</tr>
<tr>
<td>Manage</td>
<td></td>
<td>Manage Work Plan</td>
<td></td>
</tr>
<tr>
<td>Close</td>
<td></td>
<td>Close Work Plan</td>
<td></td>
</tr>
</tbody>
</table>
Step 4: Refine Method Content
Refine method content

CMMI

- Content review and approval
- Deloitte leading practices
- Deloitte samples
- Source for method sponsors, super users, coaches, and change champions
- Continuous improvement feedback
Step 5: Implement and Support Method

1. Select Framework(s)
2. Design Method Architecture
3. Design Method Tasks
4. Refine Method Content
5. Implement and Support Method
Summary of Deloitte’s Project Management Approach

Methods

MS-Project Template Plans

Project Management
- Project Plan
- Project Charter
- Project Management Plan
- Deliverable Log
- Work Plan

Standards
Driven Planning and Management

Plan the work

- Project Charter
- Project Management Plan
- Deliverable Log
- Work Plan

Manage the work

- Manage Deliverable Lifecycle
- Manage Project Controls
- Manage Work Plan

Training and Coaching

“How-to” Guides

Project Management Center

Templates and Samples

Deloitte Consulting LLP
January, 2012

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Project Management components

PIM method

• Practical tasks and procedures
• Preconfigured, ready-to-use templates and tools
• Integrated into Deloitte’s core methods as the Project Management (PM) and Quality Management (QM) disciplines
• Closely aligned with the following:
  - Deloitte’s Project Management Standards
  - PMBOK Fourth Edition
  - Industry-recognized CMMI leading practices
  - Deloitte’s Project Management Center (PMC) tool

PMC tool

• Secure, Internet-based project management solution
• A “a single source of the truth” for distributed and virtual project teams
• Provides work plan management, project controls, dashboard and reporting capabilities
• Intended for use by Deloitte, client and 3rd-party project team members
• Build on HP’s industry-leading PPM Center software
• Centrally hosted by Deloitte
• Provided to projects at no cost
Key Enabler: Template Project Work Plans

The PIM method structure and project work plan(s) follow the standard work breakdown structure (WBS).
Sample Training Content:
1.PM.PL.01002: Project Management Plan (Work Product: Deliverable)

Purpose
To document the resources and processes that will be used to execute an effective project and create high-quality deliverables that meet client requirements. Covers the project organization, work plan approach, deliverable management and project controls, resource plan, project tools, communications and status reporting, and the project’s data privacy approach.

Deliverable Description: Project Management Plan

The Project Management Plan represents a vital project management document created during initial project planning and maintained throughout the life of the project. It is a detailed plan for how the project is organized and how it will be executed, monitored, and controlled.

Project Management Plan Content
- Project organization
- Approach and timeline
- Work planning and controls
- Resource management
- Tools and status reporting plans
Wrap up and key takeaways
Creating your Project management method: Roadmap

Follow the five-step process to design, develop, and implement a framework-driven project management (PM) method.

- Consider PM and QM “disciplines” in an overall SDLC method (or industry-specific method)

The Business Case: Can your PMO afford *not* to have a framework-based Method?
Recap: Leveraging the PMBOK in your project management method or approach

• Avoid the worst PMO practices!
• Leverage the PMBOK (or other framework) with a focus on usability, efficiency, and adoption
• Leadership and end user input, review, and approval is critical for method adoption
• Incorporate leading practices and standards
• Integrate your method with standards, methods, and tools that meet your needs
• Deploy with the required sponsorship and communications
• Support implementation with the right training and coaching
• Measure adoption formally and informally
• Continuously improve pitfalls!
Questions
Contact

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