

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



Agenda

Topic

Background

Framework overview

Implementing a framework-driven approach

Key takeaways and Q&A

Your speaker



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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.”

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

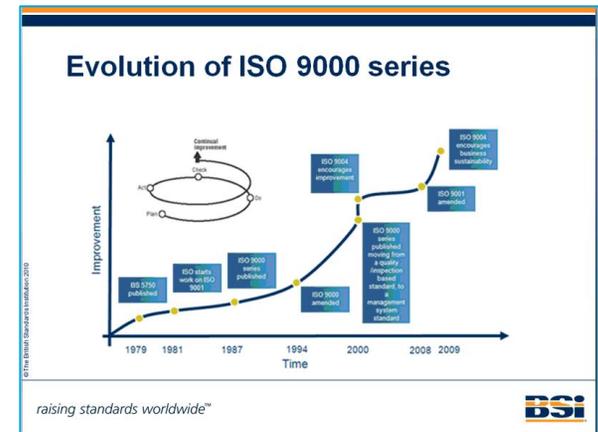


Framework landscape

Many project management and quality-based frameworks have emerged in the marketplace over the past 25-30 years

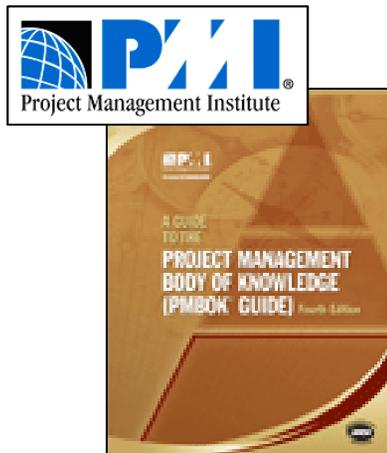


Total Quality Management (TQM)



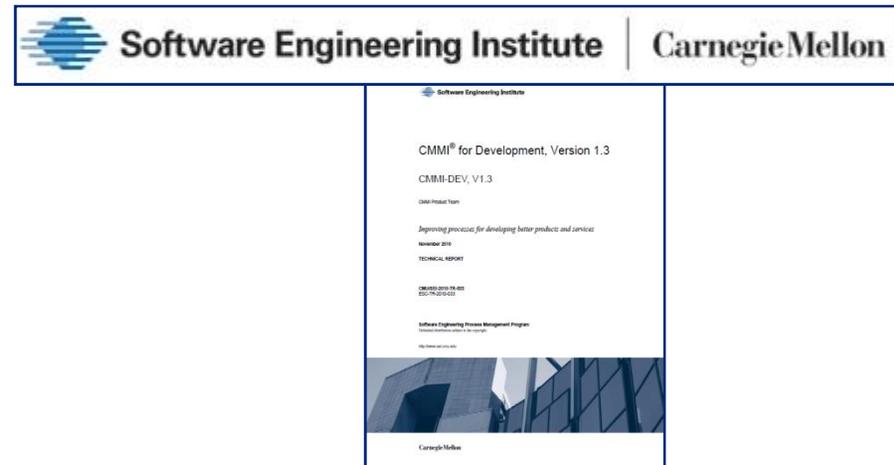
Deloitte's chosen frameworks

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)**.



PMBOK Guide

- Same terminology
- Same scope

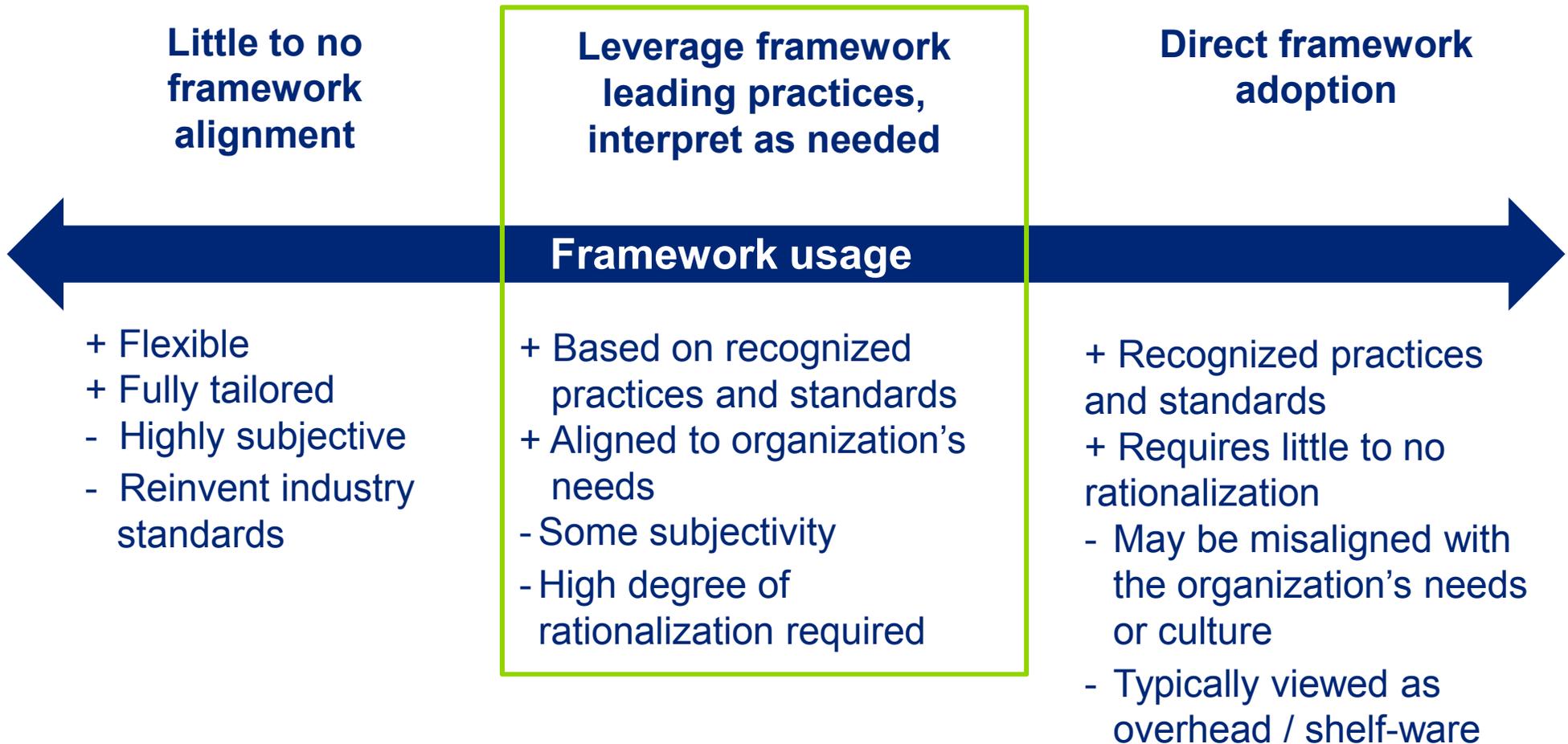


CMMI

- 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:



Framework usage considerations

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

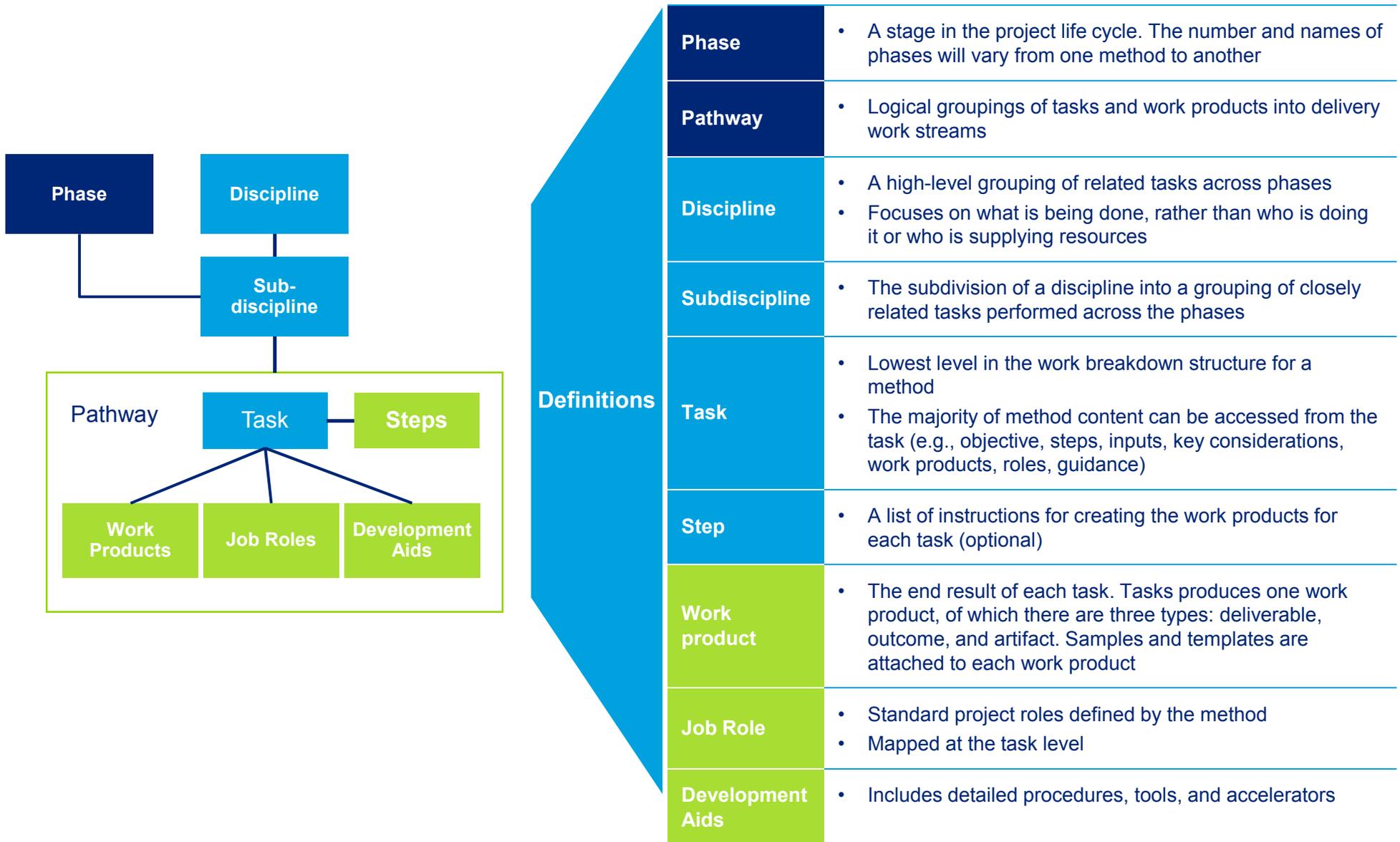
- **Select the appropriate framework(s)**
 - Find the framework(s) that meets the organization's goals
 - Understand what the selected framework(s) provide and require
- **Translate the framework(s)**
 - Translate the framework into a structure that works for the organization
 - Rationalize the framework 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



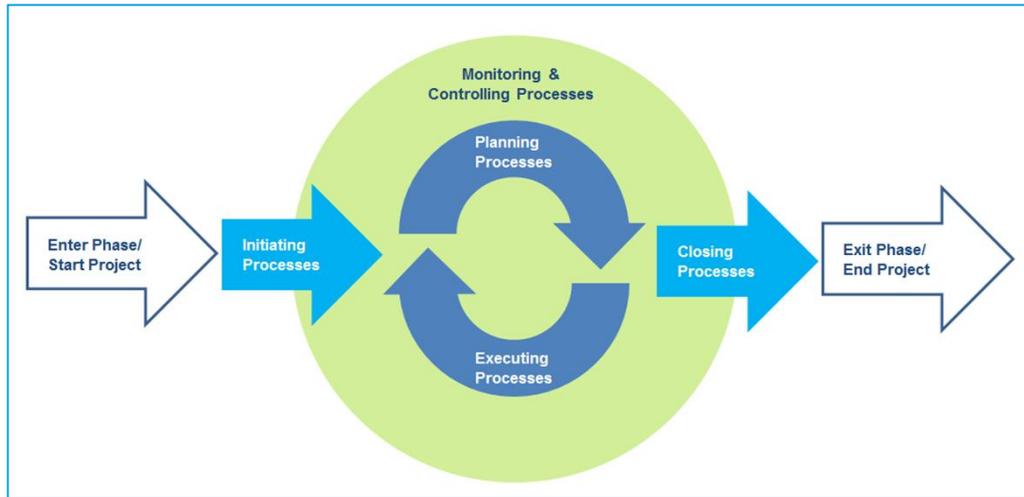
Method architecture

Each Deloitte method adheres to the structure below:



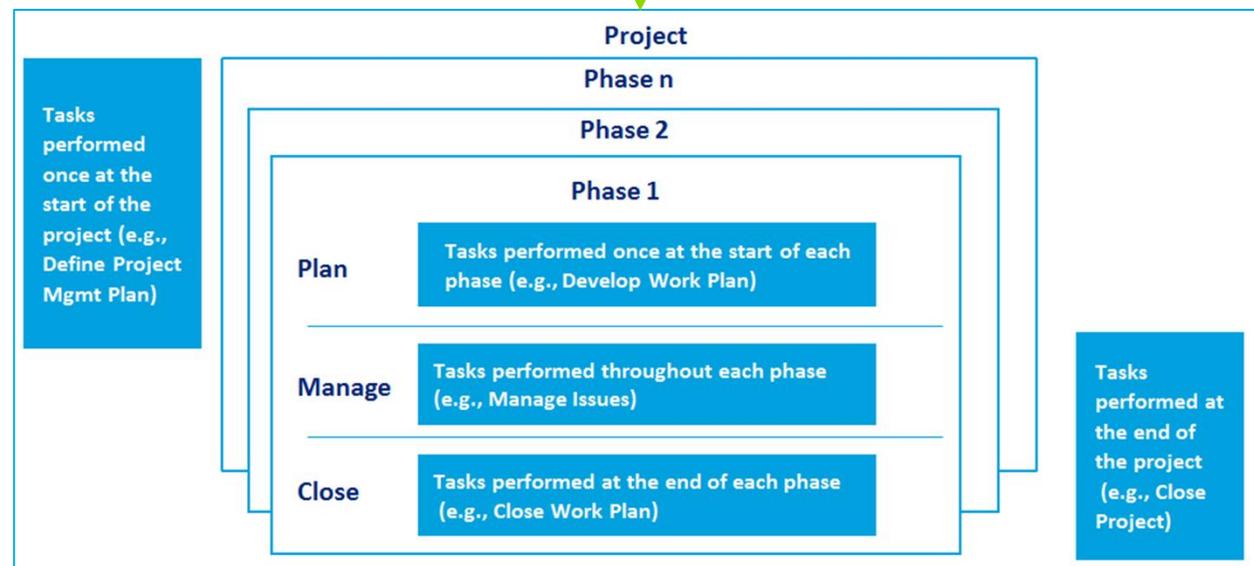
Design method architecture

PMBOK Process Group Model



Key questions:

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



Deloitte Project and Integration Management (PIM) Method architecture

Step 3: Design Method Tasks



Design method tasks

PMBOK Fourth Edition (42 management processes)

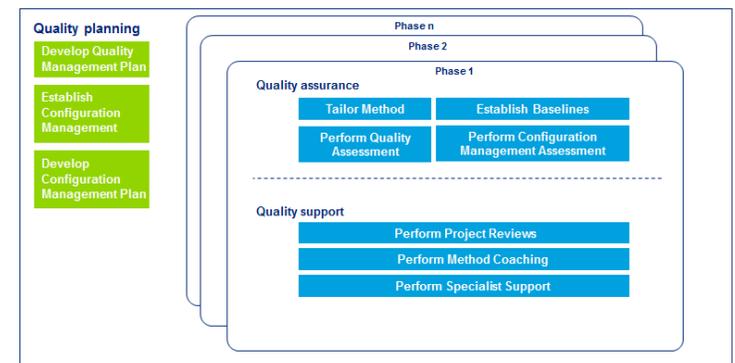
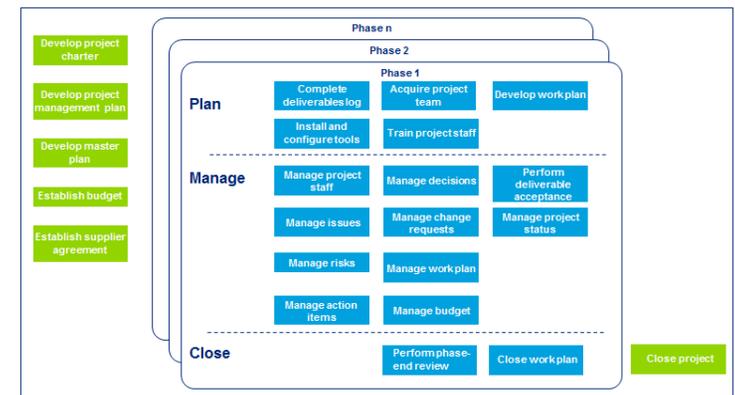
Knowledge Area	Project Management Process Group				
	Initiating	Planning	Executing	Monitoring and Controlling	Closing
1. Project Integration Management	1.1 Develop Project Charter	1.2 Develop Project Management Plan	1.3 Direct and Manage Project Work	1.4 Monitor and Control Project Work	1.5 Close Project or Phase
2. Project Scope Management		2.1 Collect Requirements 2.2 Define Scope 2.3 Create WBS		2.4 Verify Scope 2.5 Control Scope	
3. Project Time Management		3.1 Define Activities 3.2 Estimate Activity Durations 3.3 Develop Schedule 3.4 Control Schedule		3.5 Monitor Schedule	
4. Project Cost Management		4.1 Estimate Costs 4.2 Determine Budget		4.3 Monitor Costs	
5. Project Quality Management		5.1 Plan Quality 5.2 Perform Quality Assurance	5.3 Perform Quality Control		
6. Project Resource Management		6.1 Estimate Human Resources 6.2 Acquire Project Team 6.3 Develop Project Team 6.4 Manage Project Team			
7. Project Communications Management	7.1 Identify Stakeholders	7.2 Plan Communications	7.3 Manage Communications 7.4 Monitor Communications		
8. Project Risk Management		8.1 Plan Risk Management 8.2 Identify Risks 8.3 Perform Qualitative Risk Analysis 8.4 Perform Quantitative Risk Analysis 8.5 Plan Risk Responses			
9. Project Procurement Management		9.1 Plan Procurement 9.2 Procure	9.3 Control Procurement		

Key questions:

- How should the processes and deliverables be combined?
- When should they be subdivided?
- When should they be moved into other disciplines?

PM
discipline
(23 tasks)

QM
discipline
(10 tasks)



PIM Framework (33 Tasks Total) ↔ PMBOK Mapping

		Initial Phase	All Phases	Final Phase										
Project Management (23 Tasks)	Plan	<ul style="list-style-type: none"> Develop Project Charter^{I,S} Develop Project Management Plan^{I,S,H,Cm,R,P} Develop Master Plan^T Establish Budget^{Co} Establish Supplier Agreement^P 	<ul style="list-style-type: none"> Complete Deliverables Log^S Develop Work Plan^T Acquire Project Team^H Install and Configure Tools^I Train Project Staff^H 											
	Manage		<ul style="list-style-type: none"> Manage Project Staff^H Manage Risks^R Manage Issues^I Manage Action Items^I Manage Decisions^I Manage Change Requests^{I,S} Manage Work Plan^{T,Co} Manage Budget^{Co} Perform Deliverable Acceptance^S Manage Project Status^{I,Cm} 											
Quality Management (10 Tasks)	Close		<ul style="list-style-type: none"> Perform Phase-end Review^I Close Work Plan^T 	<ul style="list-style-type: none"> Close Project^I 										
	Quality Planning	<ul style="list-style-type: none"> Develop Quality Management Plan^Q Develop Configuration Management Plan^I Establish Configuration Management^I 												
	Quality Assurance		<ul style="list-style-type: none"> Tailor Method^Q Perform Quality Assessment^Q Perform Configuration Management Assessment^I Establish Baselines^I 											
	Quality Support		<ul style="list-style-type: none"> Perform Project Reviews Perform Method Coaching Perform Specialist Support 											
Legend		<div style="border: 1px dashed black; padding: 5px;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;">I: Integration Mgmt</td> <td style="width: 20%;">T: Time Mgmt</td> <td style="width: 20%;">R: Risk Mgmt</td> <td style="width: 20%;">H: HR Mgmt</td> <td style="width: 20%;">Q: Quality Mgmt</td> </tr> <tr> <td>S: Scope Mgmt</td> <td>Co: Cost Mgmt</td> <td>Cm: Comm Mgmt</td> <td>P: Procurement Mgmt</td> <td></td> </tr> </table> </div>			I: Integration Mgmt	T: Time Mgmt	R: Risk Mgmt	H: HR Mgmt	Q: Quality Mgmt	S: Scope Mgmt	Co: Cost Mgmt	Cm: Comm Mgmt	P: Procurement Mgmt	
I: Integration Mgmt	T: Time Mgmt	R: Risk Mgmt	H: HR Mgmt	Q: Quality Mgmt										
S: Scope Mgmt	Co: Cost Mgmt	Cm: Comm Mgmt	P: Procurement Mgmt											

PMBOK Mapping Example: Project Time Management

PMBOK

	Project Management Process Groups				
Knowledge Areas	Initiating	Planning	Executing	Monitoring & Control	Closing
Project Time Management		<ul style="list-style-type: none"> Define Activities Sequence Activities Estimate Activity Resources Estimate Activity Duration Develop Schedule 		<ul style="list-style-type: none"> Control Schedule 	

Project Management Discipline

Sub-Disciplines / Phase	Initial Phase	All Phases	Final Phase
Plan	Develop Master Plan	Develop Work Plan	
Manage		Manage Work Plan	
Close		Close Work Plan	

Step 4: Refine Method Content



Step 5: Implement and Support Method



Summary of Deloitte's Project Management Approach

Methods



MS-Project Template Plans

ID	Name	Work	Duration	Start	Finish	Predecessors	Successors
0	Basic Work Plan Template	0 hrs	8 days	Mon 5/2/11	Wed 5/11/11		5,6,8,4
1	1.000 Project	0 hrs	8 days	Mon 5/2/11	Mon 5/2/11		
2	2 Project Management	0 hrs	8 days	Mon 5/2/11	Wed 5/11/11		
3	2.1 Plan	0 hrs	2 days	Mon 5/2/11	Tue 5/3/11		
4	2.1.1 Develop Project Charter	0 hrs	1 day	Mon 5/2/11	Mon 5/2/11	1	5
5	2.1.2 Develop Project Management Plan	0 hrs	1 day	Mon 5/2/11	Tue 5/3/11	1,4	9
6	2.1.3 Complete Deliverable Log	0 hrs	1 day	Mon 5/2/11	Mon 5/2/11	1	7,9
7	2.1.4 Develop Work Plan	0 hrs	1 day	Tue 5/3/11	Tue 5/3/11	8	9
8	2.1.5 Train Project Staff	0 hrs	1 day	Mon 5/2/11	Mon 5/2/11	1	10,9
9	2.1.6 Plan Complete	0 hrs	0 days	Tue 5/3/11	Tue 5/3/11	4,5,6,7	17
10	2.2 Manage	0 hrs	1 day	Wed 5/4/11	Wed 5/4/11		
11	2.2.1 Manage Project Staff	0 hrs	1 day	Wed 5/4/11	Wed 5/4/11	9	13
12	2.2.2 Close	0 hrs	1 day	Wed 5/11/11	Wed 5/11/11		
13	2.2.3 Close Work Plan	0 hrs	1 day	Wed 5/11/11	Wed 5/11/11	11,25	26
14	3 Develop ->Solution	0 hrs	6 days	Tue 5/3/11	Tue 5/10/11		
15	3.1 Deliverable 1	0 hrs	3 days	Tue 5/3/11	Thu 5/5/11		
16	3.1.1 Draft Deliverable 1	0 hrs	1 day	Tue 5/3/11	Tue 5/3/11	8	17
17	3.1.2 Review and revise Deliverable 1	0 hrs	1 day	Wed 5/4/11	Wed 5/4/11	16	18
18	3.1.3 Sign-off Deliverable 1	0 hrs	1 day	Thu 5/5/11	Thu 5/5/11	17	19
19	3.1.4 Deliverable 1 Complete	0 hrs	0 days	Thu 5/5/11	Thu 5/5/11	18	21,28

Project Usage Models

	Basic	Effort-Managed	Actuals-Managed
Work Planning (Outlineable progression, with clear targets or goals)	<ul style="list-style-type: none"> Deliverable based, effort based work plan Accountable resource assigned to work plan Weekly % complete tracking Weekly re-planning 	<ul style="list-style-type: none"> Multiple aligned, effort based work plan Accountable resource assigned to work plan Work plan or office meeting of deliverables (that is, task instances) Weekly % complete tracking Earn versus plan and deliverable completion assessed weekly Weekly re-planning 	<ul style="list-style-type: none"> Iterative aligned, effort based work plan Resource assigned to work plan Work plan or office meeting of deliverables Weekly status and ETC tracking EVM and deliverable completion assessed weekly Weekly re-planning
Scope / Deliverables	<ul style="list-style-type: none"> Scope documented Deliverable log with reviews and sign-off/acceptance Defined scope, issue and risk process 	<ul style="list-style-type: none"> Scope documented Deliverable log with reviews and sign-off/acceptance Defined scope, issue and risk process 	<ul style="list-style-type: none"> Scope documented Deliverable log with reviews and sign-off/acceptance Defined scope, issue and risk process
Criteria	<ul style="list-style-type: none"> RAI = GREEN and Opportunity Revenue >= \$2.5M 	<ul style="list-style-type: none"> RAI = YELLOW or RED or Opportunity Revenue >= \$2.5M 	<ul style="list-style-type: none"> Client or Firm mandated
Target Projects	<ul style="list-style-type: none"> Team advisory Business case/feasibility Non-implementation 	<ul style="list-style-type: none"> Implementation 	<ul style="list-style-type: none"> Implementation

Training and Coaching

Deloitte.

Project Management Center Training
01 PMC Basics



Project Management Center

Deloitte.

Project Management Center

Templates and Samples

Deloitte. Project Management Plan WPM2007

3 Project Work Plan Approach

3.1 Project Work Plan Definition

3.1.1 Standard Project Work Breakdown Structure (WBS)

The project's Work Plan will be based on Deloitte's standard work breakdown structure (WBS), illustrated below:

Level	Definition	WBS Outline
0	Project/Release	<Name>
1	Phase	1
2	Discipline	1.XX
3	Subdiscipline	1.XX.XX
4	Task	1.XX.XX.11111
5	Task Instance*	1.XX.XX.11111.1111
6	Step (opt.)	1.XX.XX.11111.1111.11

* Level 5 is not applicable for single instance tasks (e.g., Develop Project Management Plan). Multiple instance tasks will define each task instance at Level 5 (e.g., Develop Functional Specification x; Develop Functional Specification y, etc.)

3.1.2 Master Plan

The project will develop a Master Plan (a Gantt chart in MS-Excel) that reflects the schedule for the phases, major activities, releases, and deployments. The Master Plan will contain key project milestones and summarize the critical path schedule for the project. The Master Plan will also include estimates for project resources by full-time equivalents (FTEs), hours, and costs (S).

The Master Plan will be reviewed, approved, and archived. On an ongoing basis, the Master Plan will be maintained to reflect changes to the underlying schedule that may result from the approved Work Plans.

"How-to" Guides

Deloitte.

Develop Effort Managed Work Plan

Guidebook

Deloitte Consulting LLP
January, 2012

Project Management components

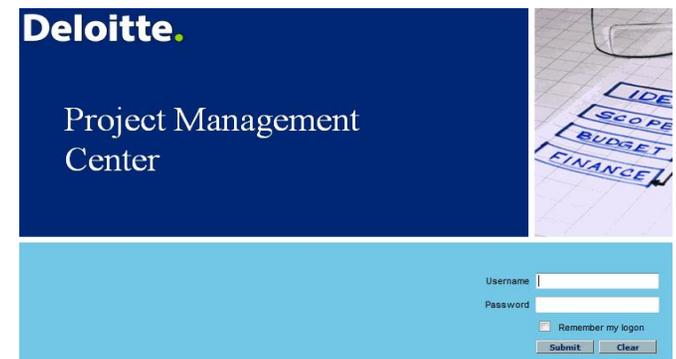
PIM method

- 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).

Standard WBS

Level	Definition	WBS Outline
0	Project /Release	<Name>
1	Phase	X
2	Discipline	X XX
3	Sub-Discipline	X.XX.XX
4	Task	X.XX.XX.11111
5	Work Product	X.XX.XX.11111.11111
6	Step (optional)	X.XX.XX.11111.1111.11

Standard Work Plan

	WBS	Name
0	0	EVD SAP 3.4 Template
1	1	Start of Project Preparation
2	1.PM	Project Management Discipline
3	1.PM.PL	Plan Subdiscipline
4	1.PM.PL.01000	Develop Project Charter
5	1.PM.PL.01000.0001	Project Charter
6	1.PM.PL.01032	Establish Budget
7	1.PM.PL.01032.0001	Budget and Cost Tracking
8	1.PM.PL.01002	Develop Project Management Plan
9	1.PM.PL.01002.0001	Project Management Plan
10	1.PM.PL.01015	Develop Master Plan
11	1.PM.PL.01015.0001	Master Plan
12	1.PM.PL.02689	Develop Project Tools Strategy
13	1.PM.PL.02689.0001	Project Tools Strategy
14	1.PM.PL.01033	Install and Configure Tools
15	1.PM.PL.01033.0001	Project Management Center - Project Tools
16	1.PM.PL.01033.0002	SharePoint - Project Tools
17	1.PM.PL.01033.0003	IndustryPrint 5 - Project Tools
18	1.PM.PL.01035	Develop Work Plan
19	1.PM.PL.01035.0001	Project Preparation - Work Plan
20	1.PM.PL.01038	Complete Deliverables Log
21	1.PM.PL.01038.0001	Project Preparation - Deliverables Log

PIM 2.3 Method

Deloitte.

Sample Training Content:

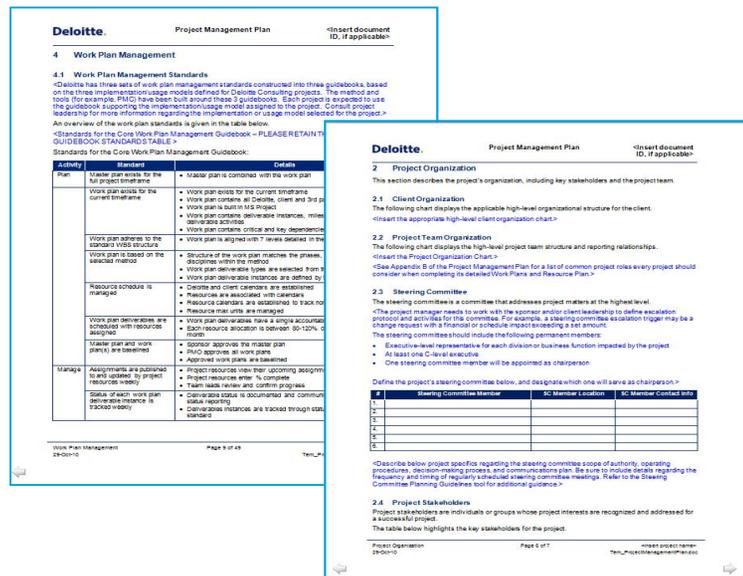
1.PM.PL.01002: Project Management Plan (Work Product: Deliverable)

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



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