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Jonathan L. Portny, MBA, PMP[®]

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Project management experts and certified
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Project Management

6th Edition

by Jonathan L. Portny, MBA, PMP®

Certified Project Management Professional (PMP®)

Stanley E. Portny, PMP®

Certified Project Management Professional (PMP®)

**for
dummies®**
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Project Management For Dummies® , 6th Edition

Published by: **John Wiley & Sons, Inc.**, 111 River Street, Hoboken, NJ 07030-5774, www.wiley.com

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Published simultaneously in Canada

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Library of Congress Control Number: 2022932726

ISBN 978-1-119-86981-8 (pbk); ISBN 978-1-119-86991-7 (ebk); ISBN 978-1-119-86982-5 (ebk)

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Introduction

Projects have been around since ancient times. Noah building the ark, Leonardo da Vinci painting the *Mona Lisa*, J.R.R. Tolkien writing *The Hobbit*, Moderna and Pfizer developing their COVID-19 vaccines — all projects. And as you know, these were all masterful successes. Well, the products were a spectacular success, even if schedules and resource budgets were drastically overrun!

Why, then, is the topic of project management of such great interest today? The answer is simple: The audience has changed and the stakes are higher.

Historically, projects were large, complex undertakings. The first project to use modern project management techniques — the Polaris weapons system in the early 1950s — was a technical and administrative nightmare. Teams of specialists planned and tracked the myriad of research, development, and production activities. They produced mountains of paper to document the intricate work. As a result, people started to view project management as a highly technical discipline with confusing charts and graphs; they saw it as inordinately specialist-driven and definitely off-limits for the common person!

Because of the growing array of huge, complex, and technically challenging projects in today's world, people who want to devote their careers to planning and managing those projects are vital to their successes. Over the past 30 to 35 years, the number of projects in the regular workplace has skyrocketed. Projects of all types and sizes are now *the* way that organizations accomplish their work.

At the same time, a new breed of project manager has emerged. This new breed may not have set career goals to become project managers — many among them don't even consider themselves to be project managers, at least not as their primary role. But they do know they must successfully manage projects to move ahead in their careers. Clearly, project management has become a critical skill, not a career choice.

Even though these people realize they need special tools, techniques, and knowledge to handle their new types of assignments, they may not be able to devote large amounts of time to acquiring them without adversely impacting other responsibilities, which is where this book comes into play. This book is devoted to this silent majority of project managers.

About This Book

This book helps you recognize that the basic tenets of successful project management are simple. The most complex analytical technique takes less than ten minutes to master! In this book, we discuss information that's necessary to plan and manage projects and provide important guidelines for developing and using this information. Here, you discover that the real challenge to a successful project is dealing with the multitude of people whom the project may affect or need for support. There are plenty of tips, hints, and guidelines for identifying key players and then involving them.

But knowledge alone won't make you a successful project manager — you need to apply it. This book's theme is that project management skills and techniques aren't burdensome tasks you perform because some process requires it. Rather, they're a way of thinking,

communicating, and behaving. They're an integral part of how we approach all aspects of our work every day.

So this book is intended to be direct and (relatively) easy to understand. But don't be misled — the simple text still navigates all the critical tools and techniques you'll need to support your project planning, scheduling, budgeting, organizing, and controlling. So buckle up!

This information is presented in a logical and modular progression. Examples and illustrations are plentiful — so are the tips and hints. And we (attempt to) inject humor from time to time to keep it all in perspective. The goal is that you finish reading this book feeling that good project management is a necessity and that you're determined to practice it!

Of course, we want you to read every single word in this book, but we understand your life is busy and you may have time to read only what's immediately relevant to you. In that case, feel free to skip the sidebars. Although the sidebars offer interesting, real-life stories of our own experiences, they're not vital to grasping the concepts.

Foolish Assumptions

When writing this book, we assumed that a widely diverse group of people would read it, including the following:

- » Senior managers and junior-level staff (who'll become tomorrow's senior managers)
- » Experienced project managers and people who've never been on a project team
- » People who've had significant project management training and people who've had none whatsoever

- » People who've had years of real-world business and government experience and people who've only recently entered the workforce

After reading this book, we hope you wonder (and rightfully so) why all projects aren't well-managed — because you'll think these techniques are so logical, straightforward, and easy to use. But we also assume you recognize there's a big difference between *knowing* what to do and *doing* it. We assume you realize you'll have to work hard to overcome the forces that conspire to prevent you from using these tools and techniques.

Finally, we assume you'll realize that you can read this book repeatedly and learn something new and different each time. Think of this book as a comfortable resource that has more to share as you experience new situations.

Icons Used in This Book

We include small icons in the left margins of the book to alert you to special information in the text. Here's what they mean:



REMEMBER We use this icon to point out important information you should keep in mind as you apply the techniques and approaches.



TIP This icon highlights techniques or approaches you can use to improve your project management practices.



WARNING This icon highlights potential pitfalls and danger spots that you should attempt to avoid or be prepared to address if they come to fruition.

Beyond the Book

In addition to the material in the print or e-book you're reading right now, you can access free companion materials online. Simply navigate to www.dummies.com and search for "Project Management For Dummies Cheat Sheet." From there you'll be able to read or print several useful articles about confirming your project's justification, developing meaningful project objectives, developing achievable project schedules, eliciting and sustaining commitment for projects, holding people accountable, and avoiding common project pitfalls.

Where to Go from Here

You can read this book in many ways, depending on your own project management knowledge and experience and your current needs. However, we suggest you first take a minute to scan the table of contents and thumb through the parts of the book to get a feeling for the topics we cover.

If you're new to project management and are just beginning to form a plan for a project, first read [Parts 1](#) and [2](#), which explain how to plan outcomes, activities, schedules, and resources. If you want to find out how to identify and organize your project's team and other key people, start with [Part 3](#). If you're ready to begin work or you're already in the midst of your project, you may want

to start with [Part 4](#). Or feel free to jump back and forth, hitting the chapters with topics that interest you the most.

The most widely recognized reference of project management best practices is *A Guide to the Project Management Body of Knowledge (PMBOK)*, published by the Project Management Institute (PMI). The seventh and most recent edition of *PMBOK (PMBOK 7)* was published in 2021. The Project Management Professional (PMP) certification — the most recognized project management credential throughout the world — includes an examination (administered by PMI) with questions based on *PMBOK 7*.

Because we base this book on best practices for project management activities, the tools and techniques we cover are in accordance with *PMBOK 7*. However, if you're preparing to take the PMP examination, use this book as a companion to *PMBOK 7*, not as a substitute for it.

As you read this book, keep the following points in mind:

- » *PMBOK 7* identifies *what* best practices are but doesn't address in detail *how* to perform them or deal with difficulties you may encounter as you try to perform them. In contrast, this book focuses heavily on *how* to perform these project management techniques and processes.
- » We've revised and updated the book so that all the tools and techniques discussed and all the terminology used to describe those tools and techniques are in agreement with those used in *PMBOK 7* and, when possible, prior PMBOK editions.
- » Where appropriate, we include a section at the end of each chapter that specifies where the topics in the

chapter are addressed in *PMBOK 7*.

- » *PMBOK 7* often contains highly technical language and detailed processes, which people mistakenly dismiss as being relevant only for larger projects. This book, however, deliberately frames terms and discussions to be user-friendly. As a result, people who work on projects of all sizes can understand how to apply the tools and techniques presented.

No matter how you make your way through this book, plan on reading all the chapters more than once — the more you read a chapter, the more sense its approaches and techniques will make. And who knows? A change in your job responsibilities may create a need for certain techniques you've never used before. Enjoy and good luck!

Part 1

Getting Started with Project Management

IN THIS PART ...

Discover what project management is all about and whether you have what it takes to be a successful project manager.

Learn about the changes to *A Guide to the Project Management Body of Knowledge, 7th Edition (PMBOK 7)* from the prior edition and the rationale for the substantial overhaul.

Check out the documents you need to assess a project's feasibility and desirability, including the business case, the project charter, the preliminary stakeholder register, and the preliminary assumptions list. Consider how the data generated from a preliminary needs assessment, a feasibility study, and a cost-benefit analysis generate information needed to support the decision of whether to consider a proposed project further.

Find out how to identify people who may need to be involved in your project, and decide whether, when, and how to involve them. After you know who should be involved, determine who has the authority, power, and interest to make critical decisions along the way.

Think about the big picture of what your project is trying to accomplish (and why). Then get the scoop on writing a scope statement to confirm the results your project will produce and the constraints and assumptions under which everyone will work.

Outline the work you have to do to meet the expectations for your project, and find out how to break that work down into manageable chunks.

Chapter 1

Project Management: The Key to Achieving Results

IN THIS CHAPTER

- » **Defining a project and its four phases**
 - » **Breaking down project management**
 - » **Shifting from process-based to principles-based project management**
 - » **Determining whether you have what you need to be successful**
-

Successful organizations create projects that produce desired results in established timeframes with assigned resources. As a result, businesses are increasingly driven to find individuals who can excel in this project-oriented environment.

Because you're reading this book, chances are good that you've been asked to manage a project (or multiple projects!). So, hang on tight — you're going to need a new set of skills and techniques to steer that project to successful completion. But not to worry! This chapter gets you off to a smooth start by showing you what projects and project management really are and by helping you separate projects from non-project assignments. This chapter also offers rationale for why projects succeed or fail and gets you into the project management mindset.



REMEMBER

We are hopeful that you read this book's Introduction but, if not, don't worry, we can bring you up to speed. Whether you read the Introduction or not, keep in mind as you're reading that one of our intentions with this book is to help you navigate the Project Management Institute (PMI)-published *A Guide to the Project Management Body of Knowledge, 7th Edition* (we use the abbreviation *PMBOK 7* throughout the book) and prepare you for the PMI-administered Project Management Professional (PMP) certification exam.

Since PMI's first edition of the *Project Management Body of Knowledge (PMBOK)* in 1987, *The Standard for Project Management* included in and explained by the *PMBOK Guide* has remained a process-based standard aimed at enabling consistent and predictable outcomes... until now. *PMBOK 7* introduces a fundamental shift from the process-based standard of the previous versions to the now principles-based approach of *PMBOK 7*, with a newly refined focus on intended outcomes rather than project phases and deliverables.

PMI has ensured that nothing in *PMBOK 7* negates any of the processes, terminology, or concepts of *PMBOK 6* and prior, but rather complements the content of the previous versions, with an updated and more holistic view of project management and its ability to deliver valuable outcomes to stakeholders. A few of the most fundamental concepts from the prior *PMBOK* editions (Editions 1 through 6), discussed in earlier editions of this *For Dummies* book (Editions 1 through 5), will always be true even if not explicitly referenced by name in *PMBOK 7*. We review those in the next few sections.

You'll know that we've transitioned to *PMBOK* 7 concepts and terminology when you reach the "[Adopting a Principled Approach to Project Management](#)" section of this chapter.

Determining What Makes a Project a Project

No matter what your job is, you handle a myriad of assignments every day. For example, you may prepare a status report, conduct a meeting, design a marketing campaign, or relocate to new offices. Or you may make your company's information systems more user-friendly, develop a research compound in the laboratory, or improve the organization's public image. Not all these assignments are projects. How can you tell which ones are and which ones aren't? This section is here to help.

Understanding the three main components that define a project

A *project* is a temporary undertaking performed to produce a unique product, service, or result. Large or small, a project always has the following three components:

- » **Specific scope:** Desired results or products (check out [Chapter 5](#) for more on describing desired results)
- » **Schedule:** Established dates when project work starts and ends (see [Chapter 7](#) for how to develop responsive and feasible project schedules)
- » **Required resources:** Necessary number of people, funds, and other supporting elements like lab space, test equipment, manufacturing facilities, computer hardware and software, and so on (see [Chapter 8](#) for