

项目管理系列教材
XIANG MU GUAN LI XI LIE JIAO CAI

项目

管理英语

XIANG MU GUAN LI YING YU

霍亚楼 丛书主编 霍亚楼 贾兴洪 主编



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丛书主编 霍亚楼

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主 编 霍亚楼 贾兴洪
副主编 张永生 霍治平

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霍亚楼 贾兴洪 主编

责任编辑: 曹颖洁

对外经济贸易大学出版社

北京市朝阳区惠新东街 10 号 邮政编码: 100029

邮购电话: 010-64492338 发行部电话: 010-64492342

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总 序

项目管理是在有限资源的约束下,运用系统的观点和一系列的知识、技术、方法、工具,对项目从投资决策开始到项目结束的全过程进行计划、组织、指挥、协调、控制和评价,以实现既定目标的活动。项目管理自20世纪50年代末诞生以来,从根本上提高了管理的效率和水平,因而得到了广泛的应用,从国防建设和建筑领域扩展到了制造业、信息业、农业以及政府管理等各个行业,而且还在不断地发展和完善。在发达国家,现代项目管理逐步发展成为独立的学科体系和行业,成为现代管理学的重要分支。

我国对项目管理的系统研究和行业实践开始较晚,目前正处于起步阶段,需要大批专业化、职业化的项目管理人才。部分高等院校开发了项目管理的专业或相关课程。2002年9月国家正式颁布了《项目管理师国家职业标准》。为大力推行国家职业资格证书制度,提高管理专业人员的业务素质和管理水平,满足社会经济发展对项目管理人才的需求,我国已经开始在全国组织项目管理师的培训和认证考试。为了满足大专、高职院校项目管理专业课程教学的需要,配合全国项目管理师培训考试认证工作的开展,培养合格的项目管理人才,参考各大专院校项目管理专业课程设置及《项目管理师国家职业资格标准》,我们编写了“项目管理系列教材”丛书。丛书由以下八种教材构成:《项目管理基础》、《项目进度管理》、《项目投融资管理》、《项目成本管理》、《项目质量管理与ISO 9001标准》、《项目采购管理》、《项目管理软件》及《项目管理英语》。

丛书从学生学习和教师教学的角度来编排教材,力求做到通俗易懂、易学易教。因此,在对理论高度总结、概括的同时,通过大量案例帮助学生理解,在知识、练习、案例、实训等各个环节注重不同学科知识的交叉应用,在注重培养学生实际能力的同时,设计、开发题库以帮助学生在职务资格考试中取得好成绩。

编写组

2006年11月20日

前 言

随着知识经济时代的到来、经济全球化步伐的加快，全球性的竞争日益加剧，市场变幻莫测和日益动荡。在新的竞争环境中，组织战略和项目管理将起到关键的作用。专家预测，项目经理将成为 21 世纪年轻人首选的职业。项目管理将成为组织应对新的竞争环境的挑战、求得生存和发展的重要武器。

近半个世纪以来，各国都在不遗余力地提高自己的综合实力，以求在全球竞争中获得领先优势。许多项目不断涌现，像我国的“载人航天”、“三峡工程”、“京沪高速铁路”和“嫦娥探月”等等。大型科研项目更是成为项目管理理论和实践的重要领域，项目构成了现代社会的基本活动，项目开发的成功决定了企业的兴衰，项目管理的效率和效益更是成为一个地区、一个国家快速发展和综合实力提高的重要基础。项目和项目管理正在改变一个国家的实力，影响一个地区的发展，决定一个企业的成长，造就一个人的职业道路。

本书是项目管理专业英语教材，内容包括了项目管理知识体系各方面的专业英语表述。本书采用了“主、副”课文制。主课文是该章的基本专业知识，作者对主课文从注解和练习两方面进行了重点处理，用做教师课内重点讲解的内容。副课文是针对该章内容的阅读材料，较主课文略有难度，供学有余力的学生课后自学或学生英文水平较好的学校选择授课，以便对主课文从语言和知识两方面起到巩固作用。每篇课文后的练习用以巩固专业英语的语言知识，思考题紧扣课文内容以促进学生有关内容的掌握。教师可依据学生的具体情况将思考题布置为口头或书面回答，以加强学生的口语和写作能力。

本书紧密结合专业知识，结构严谨、内容新颖、知识面广，注重与实践操作相关的知识。本书的各位编者长期从事项目管理课的双语教学和专业英语教学，书中所用英语皆为活的语言，标准地道、浅显易懂。本书不仅是项目管理专业学生学习专业英语的优秀教材，也是高等学校工商管理类专业学生学习项目管理专业知识、提高专业英语水平不可多得的读本。那些正在从

事项目管理实践的项目管理专业人员们如果阅读本书，相信也会有相应的收获。

本书由郑州大学管理科学与工程学院和河南科技学院经济管理学院6位从事项目管理研究与教学的教师共同完成。本书由霍亚楼、贾兴洪任主编，张永生、霍治平任副主编。霍亚楼负责本书总体设计、编写大纲并最终定稿。本教材编写的具体分工如下：霍亚楼（郑州大学）编写第3章；贾兴洪（河南科技学院）编写第1、2章；张永生（河南科技学院）编写第7、8章；霍治平（河南科技学院）编写第5、6章；金振辉（郑州大学）编写第9章；苗芳（河南科技学院）编写第4、10章。

本书在编写过程中，参考和引用了大量国内外有关项目管理的文献，在此向原作者致以诚挚的谢意。项目管理至今仍是一门发展中的学科，可供参考的资料并不丰富，加之作者水平所限，书中难免出现疏漏或不妥之处，敬请广大读者和同仁提出宝贵意见，以便今后改进。

编者
2007年12月于郑州

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Part 1

Project Management Concepts

Chapter 1

Project and Project Management

History of Project Management

Project management, as an idea, goes back a very long way. If you think about all of the things that have been built in the history of civilization, we have thousands of years of project experiences to learn from. A dotted line can be drawn from the software developers of today back through time to the builders of the Egyptian pyramids or the architects of the Roman aqueducts. For their respective eras, project managers have played similar roles, applying technology to the relevant problems of the times.

Yet today, when most people try to improve how their web and software development projects are managed, it's rare that they pay attention to the lessons learned from the past. The timeline we use as the scope for useful knowledge is much closer to present day than it should be.

Project management is a topic that has recently generated great interest in organizations worldwide. As product life cycles shorten, as enterprises re-engineer themselves, and as globalization increases, project-style work becomes an increasingly important aspect of business life. Because of the rapid changes in China — new businesses, joint ventures, the introduction of new technology and a booming construction sector — project management has

become a particularly important skill area.

The Definition of Project and Project Management

A project is an organizational unit dedicated to delivering a development project on time, within budget, and within predetermined technical performance specifications.

The planning, monitoring and controlling of all aspects of a project and the motivation of all those involved in it to achieve the project objectives on time and to specified cost, quality and performance.

The ultimate benefit of implementing project management techniques is having a satisfied customer — whether you are the customer of your own project, such as remodeling your basement, or a business contractor being paid by a customer to perform a project. Completing the full project scope in a quality manner on time and within budget, provides a great feeling of satisfaction. For a contractor, it could lead to additional business from the same customer in the future or from new customers referred by previously satisfied customers.

“Hey! Great for the customers, but what about me? What’s in it for me?” If you are the project manager, you have the satisfaction of knowing you lead a successful project effort. You also have enhanced your reputation as a project manager and positioned yourself for expanded career opportunities. If you are a member of a project team that successfully accomplished a project, you feel the satisfaction of being on a winning team. You not only contributed to the project’s success, but also probably expanded your knowledge and enhanced your skills along the way. If you choose to remain an individual contributor, you will be able to make a greater contribution to the future, more complicated projects. If you are interested in eventually managing projects, you will be in a position to take on additional project responsibilities.

When projects are successful, everybody wins!

Attributes of a Project

A project is an endeavor to accomplish a specific objective through a unique set of interrelated tasks and the effective utilization of resources. It has a well-defined objective stated in terms of scope, schedule, and cost. Projects are “born” when a need is identified by the customer — the people or organization willing to provide funds to have the need satisfied.

The following attributes help define a project:

A project has a well-defined objective — an expected result or product. The objective of a project is usually defined in term of scope, schedule, and cost.

A project is carried out through a series of interdependent tasks, that is, a number of nonrespective tasks that need to be accomplished in a certain sequence in order to achieve the project objective.

A project utilizes various resources to carry out the tasks. Such resources can include different people, organizations, equipment, materials, and facilities.

A project has a specific time frame, or finite life span. It has a start time and a date by which the objective must be accomplished.

A project may be a unique or one-time endeavor.

A project has a customer. The customer is the entity that provides the funds necessary to accomplish the project — it can be a person, an organization, or a group of two or more people or organizations.

Finally, a project involves a degree of uncertainty. Before a project is started, a plan is prepared based on certain assumptions and estimates. It is important to document these assumptions, since they will influence the development of the project budget, schedule, and work scope.

Some Examples of Projects

Developing and introducing a new product

Planning a wedding

Designing and implementing a computer system

Hosting a conference

Designing and producing a brochure

Building a shopping mall

Putting on a centennial celebration

Hosting a dinner for twenty relatives

Four Factors of A Project Objective

The scope of a project, also known as the project scope or the work scope is all the work that must be done in order to satisfy the customer that the deliverables (the tangible product

or items to be provided) meet the requirements or acceptance criteria agreed upon at the onset of the project. For example, the project scope might be all of the work involved in clearing the land, building a house, and landscaping to the specifications agreed upon by the contractor and the buyer. The customer expects the work scope to be accomplished in a quality manner. For example, in a house-building project, the customer expects the workmanship to be of the highest quality. Completing the work scope but leaving windows that are difficult to open and close, faucets that leak, or a landscape full of rocks will result in an unsatisfied customer.

The cost of a project is the amount that the customer has agreed to pay for acceptable project deliverables. The project cost is based on a budget that includes an estimate of the costs associated with the various resources that will be used to accomplish the project. It might include the salaries of people who will work on the project, materials and supplies, rental of equipment or facilities, and the fees of subcontractors or consultants who will perform some of the project tasks. For example, if the project is a wedding, budgeted items might include flowers, gown, tuxedo, caterer, cake, limousine rental, photographer, and so on.

The schedule for a project is the timetable that specifies when each activity should start and finish. The project objective usually states the time by which the project scope must be completed in terms of a specific date agreed upon by the customer and the individual or organization performing the work. It might be the date when a town's centennial celebration will take place or the date by which you want to complete the addition of a family room to your home.

The objective of any project is to complete the scope within budget by a certain time to the customer's satisfaction. To help assure the achievement of this objective, it is important to develop a plan before the start of the project. This plan should include all the work tasks, associated costs, and estimates of the time necessary to complete them. The lack of such a plan increases the risk of failing to accomplish the full project scope within budget and on schedule.

New Words and Phrases

respective *adj.* 分别的, 各自的

remodel *vt.* 重新塑造, 改造, 改变

predetermine *v.* 预定, 预先确定

contractor *n.* 订约人, 承包人

enhance *vt.* 提高, 增强

schedule *n.* 时间表, 进度表

assumption *n.* 假定, 设想

document *v.* 证明

joint venture 合资企业; 合营企业

endeavor *n.* 努力, 尽力

frame *n.* 结构

estimate *n.* 估计, 估价, 评估

tangible *adj.* 切实的

well-defined objective 清晰明确的目标

NOTES

1. A project is an organizational unit dedicated to delivering a development project on time, within budget, and within predetermined technical performance specifications. 一个项目是一个致力于准时交付一个发展工程, 不超支, 和在预先决定的技术性能说明书内的组织的一个单位。
2. Projects are “born” when a need is identified by the customer — the people or organization willing to provide funds to have the need satisfied. 当一个需要被愿意提供资金满足需要的顾客——个人或者组织界定时, 项目就诞生了。
3. The objective of any project is to complete the scope within budget by a certain time to the customer's satisfaction. 每一个项目都旨在以一定的预算, 在特定时间内给与顾客以某方面的满足。
4. The lack of such a plan increases the risk of failing to accomplish the full project scope within budget and on schedule. 如果没有好的计划, 无法如期完成全部项目的风险将大增大。
5. The cost of a project is the amount that the customer has agreed to pay for acceptable project deliverables. 项目成本取决于顾客购买满意项目的支付意愿。

EXERCISE

I. Phrases translation

项目 项目特征 顾客 范围 成本 进度 顾客满意

II. Fill in the blanks and put the sentences into Chinese

1. Project Management is to achieve the project objectives on time and to _____

cost, quality and performance by _____, _____ and _____ of all aspects of a project and the motivation of all those involved in it.

2. Before a project is started, a _____ is very necessary.
3. Attributes of a project have _____, _____, _____.
4. The objective of any project is to complete the _____ within budget by a certain time to the _____.
5. The schedule for a project is the _____ that specifies when each activity should start and finish.

III. Challenging questions for discussion

1. What is a project?
2. What are some attributes of a project?
3. Identify five projects in which you were involved during your lifetime.
4. What are four factors that constrain the achievement of a project objective?
5. Tell a story of some projects you know.

Chapter 2

Project Life Cycle

Introduction of the Project Life Cycle

Project managers or the organization can divide projects into phases to provide better management control with appropriate links to the ongoing operations of the performing organization. Collectively, these phases are known as the project life cycle. Many organizations identify a specific set of life cycles for use on all of their projects

Recognizing the life cycle of a project enables a manager to develop a project timeline, where the beginning and end are clearly defined. In between, the manager must marshal resources to create project deliverable on time and within budget. Project steps and workflow must be characterized.

Characteristics of the Project Life Cycle

The project life cycle defines the phases that connect the beginning of a project to its end. For example, when an organization identifies an opportunity to which it would like to respond, it will often authorize a feasibility study to decide whether it should undertake the project. The project life cycle definition can help the project manager clarify whether to treat the feasibility study as the first project phase or as a separate, stand-alone project. Where the outcome of such a preliminary effort is not clearly identifiable, it is best to treat such efforts as a separate project.

The transition from one phase to another within a project's life cycle generally involves, and is usually defined by, some form of technical transfer or handoff. Deliverables from one phase are usually reviewed for completeness and accuracy, and approved before work starts on the next phase. However, it is not uncommon for a phase to begin prior to the approval of the previous phase's deliverables when the risks involved are deemed acceptable. This

practice of overlapping phases, normally done in sequence, is an example of the application of the schedule compression technique called fast tracking.

There is no single best way to define an ideal project life cycle. Some organizations have established policies that standardize all projects with a single life cycle, while others allow the project management team to choose the most appropriate life cycle for the team's project. Further, industry common practices will often lead to the use of a preferred life cycle within that industry.

Project life cycles generally define:

- What technical work to do in each phase (for example, in which phase should the architect's work be performed?)
- When the deliverables are to be generated in each phase and how each deliverable is reviewed, verified, and validated
- Who is involved in each phase (for example, concurrent engineering requires that the implementers be involved with requirements and design)
- How to control and approve each phase.

Project life cycle descriptions can be very general or very detailed. Highly detailed descriptions of life cycles can include forms, charts, and checklists to provide structure and control.

Most project life cycles share a number of common characteristics:

- Phases are generally sequential and are usually defined by some form of technical information transfer or technical component handoff.
- Cost and staffing levels are low at the start, peak during the intermediate phases, and drop rapidly as the project draws to a conclusion.
- The level of uncertainty is highest and, hence, risk of failing to achieve the objectives is greatest at the start of the project. The certainty of completion generally gets progressively better as the project continues.
- The ability of the stakeholders to influence the final characteristics of the project's product and the final cost of the project is highest at the start, and gets progressively lower as the project continues. A major contributor to this phenomenon is that the cost of changes and correcting errors generally increases as the project continues.

Although many project life cycles have similar phase names with similar deliverables, few life cycles are identical. Some can have four or five phases, but others may have nine or more. Single application areas are known to have significant variations. One organization's