## FAST FÖRWARD PROJECI MANAGEMENT

FIFTH EDITION

A PRACTICAL HANDBOOK AND REFERENCE
FREE DOWNLOADABLE FORMS

ERIC VERZUH

Includes PMP CERTIFICATION Study Tips

# THE FAST FORWARD MBA IN PROJECT MANAGEMENT

FIFTH EDITION

ERIC VERZUH

WILEY

Cover image: @iStock.com/marigold\_88

Cover design: Wiley

This book is printed on acid-free paper.

Copyright @ 2016 by Eric Verzuh. All rights reserved

Published by John Wiley & Sons, Inc., Hoboken, New Jersey Published simultaneously in Canada

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning, or otherwise, except as permitted under Section 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 646-8600, or on the web at www.copyright.com. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at www.wiley.com/go/permissions.

Limit of Liability/Disclaimer of Warranty: While the publisher and author have used their best efforts in preparing this book, they make no representations or warranties with the respect to the accuracy or completeness of the contents of this book and specifically disclaim any implied warranties of merchantability or fitness for a particular purpose. No warranty may be created or extended by sales representatives or written sales materials. The advice and strategies contained herein may not be suitable for your situation. You should consult with a professional where appropriate. Neither the publisher nor the author shall be liable for damages arising herefrom.

For general information about our other products and services, please contact our Customer Care Department within the United States at (800) 762-2974, outside the United States at (317) 572-3993 or fax (317) 572-4002.

Wiley publishes in a variety of print and electronic formats and by print-on-demand. Some material included with standard print versions of this book may not be included in e-books or in print-on-demand. If this book refers to media such as a CD or DVD that is not included in the version you purchased, you may download this material at http://booksupport.wiley.com. For more information about Wiley products, visit www.wiley .com.

#### Library of Congress Cataloging-in-Publication Data:

Verzuh, Eric.

The fast forward MBAba in project management / Eric Verzuh. — Fifth edition.

1 online resource. — (Fast forward mba series)

Revised edition of the author's The fast forward MBAba in project management, 2011. Includes index.

Description based on print version record and CIP data provided by publisher; resource not viewed.

ISBN 978-1-119-08667-3 (pdf) — ISBN 978-1-119-08658-1 (epub) — ISBN 978-1-119-14822-7 (hardback); ISBN 978-1-119-08657-4 (paperback)

1. Project management. I. Title.

HD69.P75

658.4'04-dc23

2015032111

Printed in the United States of America

10 9 8 7 6 5 4 3 2 1

The following downloadable forms mentioned in the book are available online from www.VersatileCompany.com/FFMBAinPM. Original purchasers of this book can then open, edit, and print any of the documents using Microsoft Word or other word processing software.

Checklist for Successful Projects Project Proposal Stakeholder Analysis Project Charter Statement of Work Small Project Statement of Work Responsibility Matrix Definition Checklist Risk Analysis Template Risk Log Home Landscape Action Plan Planning Checklist Kickoff Checklist Communication Plan Task Assignment Meeting Agenda Status Report Control Checklist Closure Report Change Log Change Request Issues Log

#### ACKNOWLEDGMENTS

Project management remains a dynamic field, moving forward through the accumulated effort of many thousands of professionals who face new, interesting challenges and then generously share their lessons learned during conferences, at trade shows, through associations and over coffee with friends.

I have the privilege to both travel with the project management movement and to record the journey. To all of the project teams and project leaders who continue to innovate and move the state of the art forward, I wish to thank you for your example and the freedom with which you share what you learn.

There are, of course, particular friends and colleagues that made a direct contribution to this fifth edition, and to whom I owe particular recognition.

Don Kingsberry and The Bill & Melinda Gates Foundation, who do so much for improving lives around the world, will now be contributing to excellence in project management. Thank you for sharing the details of your Enterprise Project Management Office.

Robert Cooper is a world-renowned expert on new product development. For this edition he offered his insights on the most current practices for launching successful new products. Working with Dr. Cooper is a delight and an education.

Tim Creasey enthusiastically accepted my invitation to contribute his expertise on change management, the practices that motivate employees to change their behavior in support of project goals. Tim and his company, Prosci, are building a body of research in this field and are tireless advocates of the value of change management on projects. I appreciate his willingness to become involved in this book and to accept my editorial direction.

Mandy Dietz epitomizes the synthesis required to effectively lead projects. She long ago mastered the science of project management, and she is expert at integrating additional concepts from process management and leadership. I rely on her facilitation skills to delight our customers and appreciate her contribution to this edition with insights on stakeholder management.

Donna McEwen has a gift for translating her substantial leadership experience into practical advice in a manner that is constantly engaging. She has been a valued member of our team for well over a decade. Donna ensured the new content on Scrum and product development stayed relevant to project managers.

Both Sam Huffman and Tony Johnson examined and updated the chapters they had developed for previous editions, on Microsoft Project and PMP Exam Preparation, respectively. I appreciate the friendship and support of these two experts.

At the risk of missing other friends who spent time discussing this edition, I wish to recognize several who made valuable suggestions: Ernie Baker, Ralph Kliem, Robin Nicklas, Dale Christenson, Jeff Lynch, Jon Wagner, and Barry Otterholt.

Richard Narramore, my editor at John Wiley & Sons, excels at the role of catalyst, expanding my vision for this edition and providing the critical voice of the customer. Seventeen years ago, an editor at Wiley took a risk on an unpublished author. I am very grateful for the opportunity that Wiley provides and the partnership that continues.

My wife, Marlene Kissler, again played the critical role of sounding board and editor. This book is readable because she reads it first.

#### **ABOUT THE AUTHOR**

#### **ERIC VERZUH**

Eric Verzuh is president of The Versatile Company, a project management training and consulting firm based in Seattle, Washington.

His company trains thousands of professionals every year in the fundamentals of successful project management, including how to get the most out of Microsoft Project. Versatile's consulting practice focuses on helping firms establish consistent, practical methods for managing their projects and implementing Microsoft's enterprise project management solution. The company's client list includes large corporations as well as government agencies, small companies, and nonprofit organizations.

Verzuh has been certified as a Project Management Professional (PMP) by the Project Management Institute, and he is a founding board member of PM4NGOs, a nonprofit organization committed to promoting project management in developing countries. His other publications include articles, conference papers, and *The Portable MBA in Project Management* (2003), also published by John Wiley & Sons, Inc.

Verzuh can be reached via his company's website at www.Versatile Company.com or you can e-mail Eric directly at EVerzuh@Versatile Company.com.

Economic upheavals have sharpened the need to effectively manage transformation and innovation. Project management remains critical but is no longer sufficient; project portfolio management is now widely embraced as a strategy for aligning resources with strategic direction and iterative development methods are spreading to new industries.

This fifth edition retains the book's primary focus on excellence in project management and continues to include the enterprise project management factors that influence project success.

Parts 1 through 4 have been refreshed to stay current, including a greater emphasis on stakeholder management and the introduction of change management. Industry is increasingly concerned with measuring projects by the value they contribute to the firm. This emphasis can be seen in many chapters, particularly Chapter 4, which describes the core questions related to authorizing a project.

The most substantial updates to this edition address iterative development and the reality that innovation continues to play a larger role for nearly all firms. Chapters 3 and 10 are completely new.

More than ever, organizations are in need of leaders who can synthesize facts and assumptions to set a direction. Many government, for-profit, and nonprofit organizations have less predictability about their future than at any time in the past 50 years. Project management continues to be a discipline for navigating through turbulent circumstances.

The basics of project management can be learned quickly from this book. True understanding comes only through practice. I wish you good luck as you learn and practice the art and science of project leadership.

—Eric Verzuh Seattle, Washington

#### CONTENTS

FORMS AVAILABLE ONLINE	xii
ACKNOWLEDGMENTS	xiii
ABOUT THE AUTHOR	XV
PREFACE	xvii
PART 1	
INTRODUCTION	
CHAPTER 1 - PROJECT MANAGEMENT:	
A PLATFORM FOR INNOVATION	2
Introduction	2
Project Management Is Keeping Pace with	
Global Change	4
Project Management Is an Essential Leadership	Skillset 5
Successful Projects Deliver Value	5
The Art and Science of Project Leadership	6
A Practical Checklist for Successful Projects:	
How This Book Will Help You	8
Beyond the Book: Tools for Application and	
Continuous Learning	11

End Point	13
Stellar Performer: OrthoSpot	14
Stellar Performer: PM4NGOs	15
CHAPTER 2-FOUNDATION PRINCIPLES OF	
PROJECT MANAGEMENT	17
Introduction	17
Projects Require Project Management	17
The Challenge of Managing Projects	19
The Evolution of a Discipline	20
The Definition of Success	24
Project Management Functions	26
Project Life Cycle	28
Organizing for Projects	31
Project Managers Are Leaders	35
End Point	36
Stellar Performer: Seattle Children's Hospital and	
Regional Medical Center	37
CHAPTER 2 DILLIP CREAT PRODUCTS.	
CHAPTER 3—BUILD GREAT PRODUCTS: LESSONS FROM AGILE, LEAN START-UP.	
CHAPTER 3 – BUILD GREAT PRODUCTS: LESSONS FROM AGILE, LEAN START-UP, AND STAGE-GATE	42
LESSONS FROM AGILE, LEAN START-UP,	42 42
LESSONS FROM AGILE, LEAN START-UP, AND STAGE-GATE Introduction	
LESSONS FROM AGILE, LEAN START-UP, AND STAGE-GATE	
LESSONS FROM AGILE, LEAN START-UP, AND STAGE-GATE Introduction Defining Value: A New Lens for Judging Projects	42
LESSONS FROM AGILE, LEAN START-UP, AND STAGE-GATE Introduction Defining Value: A New Lens for Judging Projects Informs the Development Process	42 43
LESSONS FROM AGILE, LEAN START-UP, AND STAGE-GATE  Introduction Defining Value: A New Lens for Judging Projects Informs the Development Process Leverage a Consistent Product Development Process	42 43
LESSONS FROM AGILE, LEAN START-UP, AND STAGE-GATE Introduction Defining Value: A New Lens for Judging Projects Informs the Development Process Leverage a Consistent Product Development Process Best Practices for Capturing Requirements Are	42 43 44
Introduction Defining Value: A New Lens for Judging Projects Informs the Development Process Leverage a Consistent Product Development Process Best Practices for Capturing Requirements Are Integrated into a Product Development Process	42 43 44 47
Introduction Defining Value: A New Lens for Judging Projects Informs the Development Process Leverage a Consistent Product Development Process Best Practices for Capturing Requirements Are Integrated into a Product Development Process A Development Process Is Not Project Management	42 43 44 47
Introduction Defining Value: A New Lens for Judging Projects Informs the Development Process Leverage a Consistent Product Development Process Best Practices for Capturing Requirements Are Integrated into a Product Development Process A Development Process Is Not Project Management Innovation Projects Experiment to Discover Desirability and Viability End Point	42 43 44 47 48
Introduction Defining Value: A New Lens for Judging Projects Informs the Development Process Leverage a Consistent Product Development Process Best Practices for Capturing Requirements Are Integrated into a Product Development Process A Development Process Is Not Project Management Innovation Projects Experiment to Discover Desirability and Viability End Point Stellar Performer: The Lean Startup Innovation	42 43 44 47 48 49 51
Introduction Defining Value: A New Lens for Judging Projects Informs the Development Process Leverage a Consistent Product Development Process Best Practices for Capturing Requirements Are Integrated into a Product Development Process A Development Process Is Not Project Management Innovation Projects Experiment to Discover Desirability and Viability End Point Stellar Performer: The Lean Startup Innovation Movement	42 43 44 47 48 49
Introduction Defining Value: A New Lens for Judging Projects Informs the Development Process Leverage a Consistent Product Development Process Best Practices for Capturing Requirements Are Integrated into a Product Development Process A Development Process Is Not Project Management Innovation Projects Experiment to Discover Desirability and Viability End Point Stellar Performer: The Lean Startup Innovation Movement Stellar Performer: The Agile Approach to Software	42 43 44 47 48 49 51 53
Introduction Defining Value: A New Lens for Judging Projects Informs the Development Process Leverage a Consistent Product Development Process Best Practices for Capturing Requirements Are Integrated into a Product Development Process A Development Process Is Not Project Management Innovation Projects Experiment to Discover Desirability and Viability End Point Stellar Performer: The Lean Startup Innovation Movement Stellar Performer: The Agile Approach to Software Development	42 43 44 47 48 49 51
Introduction Defining Value: A New Lens for Judging Projects Informs the Development Process Leverage a Consistent Product Development Process Best Practices for Capturing Requirements Are Integrated into a Product Development Process A Development Process Is Not Project Management Innovation Projects Experiment to Discover Desirability and Viability End Point Stellar Performer: The Lean Startup Innovation Movement Stellar Performer: The Agile Approach to Software	42 43 44 47 48 49 51 53

试读结束,需要全本PDF请购买 www.ertongbook.com

#### PART 2 DEFINING THE PROJECT

CHAPTER 4-PROJECT INITIATION: TURNING	
A PROBLEM OR OPPORTUNITY INTO A PROJECT	74
Introduction	74
Project Initiation's Place in the Project Life Cycle	75
A Proposal Defines the Future Business Value	77
Managing Requirements Is Tightly Linked to	
Project Initiation	78
Common Principles for Project Initiation	80
Basic Project Proposal Content	85
Designing a Realistic Initiation Process	88
End Point	89
Stellar Performer: The Logical Framework	
Approach	90
CHAPTER 5 – KNOW YOUR KEY STAKEHOLDERS	0.0
AND WIN THEIR COOPERATION	98
Introduction	98
Stakeholder Focus Throughout the Life of the Project	99
Stakeholder Management Is Risk Management for	101
People Stals hold on Polog, Project Manager	101
Stakeholder Roles: Project Manager	102
Stakeholder Roles: Project Team Stakeholder Roles: Management	102
Stakeholder Roles: Management Stakeholder Roles: The Customer	103
Affected Stakeholders Can Make Crucial	106
Contributions	108
Engage Affected Stakeholders	110
Lead the Stakeholders	112
End Point	113
Fast Foundation in Project Management	113
rast roundation in rroject Management	113
CHAPTER 6 - WRITE THE RULES: KEY DOCUMENTS	
TO MANAGE EXPECTATIONS AND DEFINE SUCCESS	116
Introduction	116
Project Rules Are the Foundation	117
M .	-

Publish a Project Charter Write a Statement of Work Statement of Work: Minimum Content Responsibility Matrix End Point Fast Foundation in Project Management	119 121 122 129 132 133
PART 3 THE PLANNING PROCESS	
CHAPTER 7—RISK MANAGEMENT: MINIMIZE THE THREATS TO YOUR PROJECT	137
Introduction	137
All Project Management Is Risk Management	138
The Risk Management Framework	141
Step One: Identify the Risks	142
Step Two: Analyze and Prioritize the Risks	146
Step Three: Develop Response Plans	152
Step Four: Establish Contingency and Reserve	158
Step Five: Continuous Risk Management	159
Unexpected Leadership	160
End Point	160
Fast Foundation in Project Management	161
CHAPTER 8—WORK BREAKDOWN STRUCTURE: BREAK YOUR PROJECT INTO MANAGEABLE UNITS OF WORK	424
	164
Introduction	164
Defining the Work Breakdown Structure	165
Building a Work Breakdown Structure	168
Criteria for a Successful Work Breakdown Structure	172
Work Package Size	175
Planning for Quality Breaking Down Large Programs	177
Contractors or Vendors Can Provide a WBS	179
End Point	180
EHQ I OHIL	180

CHAPTER 9 – REALISTIC SCHEDULING	183
Introduction	183
Planning Overview	183
Planning Step Two: Identify Task Relationships	185
Planning Step Three: Estimate Work Packages	189
Planning Step Four: Calculate an Initial Schedule	195
Planning Step Five: Assign and Level Resources	203
Small Projects Need Smaller Plans	213
End Point	214
Fast Foundation in Project Management	214
CHAPTER 10-MANAGING AGILE DEVELOPMENT	
WITH SCRUM	216
Introduction	216
Scrum Is a Framework	217
Managing the Product Backlog	223
Make the Plan Visible: Task Boards and Burndown	
Charts	225
Key Factors for Scrum to Be Effective	227
End Point	229
CHAPTER 11 - THE ART AND SCIENCE OF	000
ACCURATE ESTIMATING	230
Introduction	230
Estimating Fundamentals	231
Estimating Techniques	237
Building the Detailed Budget Estimate	246
Generating the Cash Flow Schedule	253
End Point	254
Fast Foundation in Project Management	254
Stellar Performer: Tynet, Inc.	255
Stellar Performer: Adobe Systems	258
CHAPTER 12—BALANCING THE TRADE-OFF AMONG COST, SCHEDULE, AND QUALITY	264
Introduction	264
	264
Three Levels of Balancing a Project	265

Balancing at the Project Level	266
Balancing at the Business Case Level	278
Balancing at the Enterprise Level	283
End Point	284
Stellar Performer: Safeco Field	285
Stellar Performer: Boeing 767-400ER Program	289
PART 4 CONTROLLING THE PROJECT	
CHAPTER 13-BUILDING A HIGH-PERFORMANCE	
PROJECT TEAM	294
Introduction	294
A Framework for Building High-Performance	
Teams	298
Leadership Responsibilities	302
Building a Positive Team Environment	306
Ground Rules	307
Team Identity	309
Team Listening Skills	313
Meeting Management	317
Summary of Building a Positive Team	0.4 =
Environment	317
Collaborative Problem Solving	319
Problem Analysis	319
Decision Modes	321
Conflict Management	326
Continuous Learning	329
Summary of Collaborative Problem Solving	333
Job Satisfaction	333
End Point	334
Stellar Performer: Habitat for Humanity	335
CHAPTER 14-CLEAR COMMUNICATION AMONG	
PROJECT STAKEHOLDERS	337
Introduction	337
Embrace Your Role as a Leader	338
Creating a Communication Plan	338

Change Management: Promote Behavior Change in	
Affected Stakeholders	345
Communicating Within the Project Team	353
Closeout Reporting	361
End Point	362
Fast Foundation in Project Management	363
CHAPTER 15 - CONTROL SCOPE TO	965
DELIVER VALUE	365
Introduction	365
The Change Control Process	366
Configuration Management	372
Change Control Is Essential for Managing	
Expectations	374
End Point	374
Fast Foundation in Project Management	374
CHAPTER 16-MEASURING PROGRESS	376
Introduction	376
Measuring Schedule Performance	376
Measuring Cost Performance	380
Earned Value Reporting	382
Cost and Schedule Baselines	391
End Point	393
CHAPTER 17—SOLVING COMMON PROJECT	
PROBLEMS	396
Introduction	396
Responsibility Beyond Your Authority	396
Disaster Recovery	397
Reducing the Time to Market	398
When the Customer Delays the Project	399
The Impossible Dream	400
Fighting Fires	401
Managing Volunteers	401
End Point	402

### PART 5 ADVANCING YOUR PRACTICE OF PROJECT MANAGEMENT

CHAPTER 18—ENTERPRISE PROJECT MANAGEMENT COORDINATE ALL PROJECTS AND PROJECT	:
RESOURCES IN YOUR ORGANIZATION	405
Introduction	405
Defining Enterprise Project Management	407
Three Tiers of Management Within EPM	409
The Four Components of EPM	411
Establish Consistent EPM Processes	412
Technology Enables EPM Processes	415
The People Who Deliver Projects	419
Support Project Management: The Project Office	420
End Point	428
Stellar Performer: Bill & Melinda Gates Foundation:	100
Enterprise Project Management Office	430
CHAPTER 19—REQUIREMENTS ENGINEERING: THE KEY TO BUILDING THE RIGHT PRODUCT James Rivera and Eric Verzuh	437
Introduction	437
Requirements Engineering and Project Management Are Intimately Connected Requirement Types Illustrate the Evolving Product	438
Vision	439
Requirements Engineering Scope and Processes	441
Requirements Development Activities	443
Requirements Management Activities	445
Requirements Documentation Techniques	447
Requirements Engineering Demands Discipline	447
End Point	449
CHAPTER 20—PROJECT PORTFOLIO MANAGEMENT: ALIGN PROJECT RESOURCES WITH BUSINESS STRATEGY	450
Ralph Kliem and Eric Verzuh	
Introduction	450