

# 项目管理职场英语

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全国应用型本科商务英语系列规划教材

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## Career English of Project Management

孙圣勇 秦美娟 刘 蕾 编著  
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# 出版说明

经济贸易的蓬勃发展为我国高校商务英语专业建设提供了难得的机遇,也提出了更多的挑战。为了更好地推动商务英语本科专业的发展,对外经济贸易大学出版社组织编写了这套“全国应用型本科商务英语系列规划教材”。

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本套“全国应用型本科商务英语系列规划教材”适用于全国应用型本科院校商务英语专业、英语专业的商务/应用/外贸英语方向以及财经类专业的学生,内容包括《商务英语听说》《商务英语阅读》《商务英语写作》《商务英语函电》《商务英语翻译》《国际商务制单》《实用外经贸谈判英语教程》《国际旅游职场英语》《项目管理职场英语》等。

本系列的编撰者们不仅具有丰富的语言教学经验,而且具备商务活动的实践经验,他们集教学经验和专业背景于一身,这是本套商务英语系列教材编撰质量的有力保证。

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# FOREWORD

Career English of Project Management is an indispensable branch in the field of career English, which is helpful for acquisition of the English language, mastery of project management essentials and availability of invaluable and enjoyable materials for public English teaching.

This publication includes 18 chapters altogether covering project definition and project management, project organization and project team, project initiation, project plan, project execution and control, project conclusion, project scope management, project schedule management, project cost management, project quality management, project procurement management, project risk management, project communication and conflict management, project human resource management, project overall management, theories and methods of project management, theories and methods of uncertainty analysis and project financing and tests of project management English.

I'm honored to make a self briefing. After I obtained my Master Degree in Hunan University, I acted as a project manager in one of Guangdong provincial import and export companies for more than a decade. Fortunately for me, I was shunted to a state-owned enterprise group of Guangdong provincial government authorized management as the board secretary for 3 years. So far I have engaged in higher vocational education in my college for more than 10 years. It is to be observed that I gained my Doctor Degree in Wuhan University and became the 1st gainer of Senior Translator qualification (professor-class) in Guangdong issued by the Ministry of Human Resources and Social Security of the People's Republic of China, one of the 1st group of 12 procurers with such a professional title in China. Until now I have written 14 books and over 100 academic essays independently and got them published.

This publication is fit for the students majored in project management, commercial management, business English and civil engineering in Chinese universities and colleges, for those who are going in for project management who settle down to project management and especially for those who are going to enter for the National Career English Tests.

This publication is sponsored by Innovation Project (No. CXP05Y) of Guangdong Technical College of Water Resources and Electric Engineering (GTCWE). It's a teamwork product. Meijuan Qin edited partial sections of Chapter Three and Chapter Four, Lei Liu edited partial sections of Chapter Five and Chapter Six, Liwei Wang edited partial sections of Chapter



Seven and Chapter Eight and Qiaozhou Ye edited partial sections of Chapter Nine and Chapter Ten. The four editors completed one set of tests and keys to Project Management respectively. Last, but not the least to mention, Zunliang Wei, associate professor in Guangdong University of Technology, co-edited partial sections of Chapter Eleven and Chapter Twelve. Xianyu Yang, professor in Zhejiang Yuexiu University of Foreign Languages co-edited partial sections of Chapter Thirteen and Chapter Fourteen. Tingting Zhao in our department co-edited partial sections of Chapter Seventeen.

Shengyong Sun

Apr. 28, 2017

# Contents

<b>Chapter One Project and Project Management</b>	1
I. The Birth and Development of Project Management	1
II. Definition and Basic Characteristics of Project	2
III. Project Life Cycle	4
IV. Overview of Project Management	6
<b>Chapter Two Project Organization and Project Team</b>	11
I. Project Organization	11
II. Project Team	13
III. Project Manager	13
<b>Chapter Three Project Initiation</b>	17
I. Project Requirement Proposal	17
II. Project Feasibility Study	21
III. Content and Flag of Project Start	23
IV. Methods of Project Start	24
<b>Chapter Four Project Planning</b>	31
I. Project Planning Overview	31
II. Project Planning Processes and Development	32
III. Tools and Methods of Project Planning	34
<b>Chapter Five Project Implementation</b>	39
I. Project Implementation	39
II. Project Control	41
III. Tools and Methods of Project Implementation and Control	43
<b>Chapter Six Project Closure</b>	61
I. Project Closure	61
II. Project Appraisal	62
III. Primary Input	62
IV. Tools and Techniques of Closure	63
V. Primary Output	64
<b>Chapter Seven Project Scope Management</b>	67
I. Overview	67
II. Project Initiation	68
III. Project Scope Plan	68



IV. Project Scope Definition	69
V. Project Scope Confirmation	70
VI. Project Scope Amendment	71
<b>Chapter Eight Project Time Management</b>	<b>73</b>
I. Overview of Project Time Management	73
II. Project Activity	74
III. Project Activity Sequencing	74
IV. Project Activity Duration Estimating	76
V. Project Schedule	76
VI. Project Schedule Control	80
<b>Chapter Nine Project Cost Management</b>	<b>87</b>
I. Concept of Project Cost Management	87
II. Project Resource Planning	88
III. Project Cost Estimation	88
IV. Project Cost Budget	89
V. Project Cost Control	90
<b>Chapter Ten Project Quality Management</b>	<b>95</b>
I. Overview of Project Quality Management	95
II. Project Quality Plan	98
III. Project Quality Assurance	99
IV. Project Quality Control	101
<b>Chapter Eleven Project Procurement Management</b>	<b>109</b>
I. Overview	109
II. Procurement Planning	110
III. Solicitation Planning	113
IV. Project Inquiry	113
V. Supplier Selection	114
VI. Contract Management	115
VII. Contract Closure	117
<b>Chapter Twelve Project Risk Management</b>	<b>123</b>
I. Overview of Project Risk Management	123
II. Project Risk Identification	124
III. Project Risk Assessment	126
IV. Project Risk Response	127
V. Project Risk Control	129
<b>Chapter Thirteen Project Communication and Conflict Management</b>	<b>135</b>
I. Concept of Project Communication and Conflict	135



II. Project Communication Management .....	137
III. Project Information Releasing .....	138
IV. Project Conflict Management .....	140
<b>Chapter Fourteen Project Human Resource Management .....</b>	<b>145</b>
I. Overview of Project Human Resource Management .....	145
II. Project Human Resource Planning .....	146
III. Project Staffing .....	149
IV. Project Team Building .....	149
<b>Chapter Fifteen Project Integration Management .....</b>	<b>157</b>
I. Overview of Project Integration Management .....	157
II. Editing of Project Integration Planning .....	158
III. Execution of Project Integration Planning .....	159
IV. Execution of Project Overall Change Control .....	159
V. Practice Analysis of Project Integration Management .....	161
<b>Chapter Sixteen Theories and Methods of Uncertainty Analysis .....</b>	<b>165</b>
I. Overview of Uncertainty Analysis .....	165
II. Break-even Analysis .....	166
III. Sensitivity Analysis .....	168
IV. Probability Analysis .....	170
V. Project Risk Management and Risk Decision .....	171
<b>Chapter Seventeen Project Financing .....</b>	<b>175</b>
I. Overview of Project Financing .....	175
II. Project Financing Models .....	176
III. Project Financing Risks .....	178
<b>Chapter Eighteen Tests of Project Management English .....</b>	<b>197</b>
I. Test One China Workplace English Test (Level One) .....	197
II. Test Two China Workplace English Test (Level One) .....	205
III. Test Three China Workplace English Test (Level One) .....	211
IV. Test Four China Workplace English Test (Level One) .....	217
Keys to Test One .....	227
Keys to Test Two .....	228
Keys to Test Three .....	229
Keys to Test Four .....	230
<b>Reference .....</b>	<b>232</b>

# Chapter One

## Project and Project Management

### I. The Birth and Development of Project Management

Until 1900 civil engineering projects were generally managed by architects, engineers, and builders themselves<sup>①</sup>. It was in the 1950s that organizations started to systematically apply project management to complex engineering projects<sup>②</sup>.

Project management developed from several fields of application<sup>③</sup>. Two forefathers of project management are Henry Gantt<sup>④</sup>, who is famous for his use of the Gantt chart as a project management tool<sup>⑤</sup>; and Henri Fayol for his creation of the five management functions<sup>⑥</sup>. Both Gantt and Fayol were students of Frederick Winslow Taylor's theories of scientific management. His work is the forerunner to modern project management tools including work breakdown structure (WBS) and resource allocation.

The 1950s indicated the beginning of the modern project management era where core engineering fields come together to work as one. Project management became recognized as a distinct discipline<sup>⑦</sup>. In the United States, before the 1950s, projects were managed on an ad-hoc basis, using mostly Gantt charts and informal techniques and tools. At that time, two

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① Dennis Lock. *Project Management (9th ed.)*. Farnham: Gower Publishing, Ltd, 2007.

② Young-Hoon Kwak. *A brief History of Project Management*. Westport: Greenwood Publishing Group, 2005.

③ David I. Cleland, Roland Gareis. *Global Project Management Handbook*. Roxanne Warren: Columbus: McGraw-Hill Professional, 2006.

④ Martin Stevens. *Project Management Pathways*. High Wycombe: APM Publishing Limited, 2002.

⑤ Edward R. Marsh. The Harmonogram of Karol Adamiecki. *The Academy of Management Journal*, 1975.

⑥ Morgen Witzel. *Fifty Key Figures in Management*. Routledge, 2003.

⑦ David I. Cleland, Roland Gareis. *Global Project Management Handbook*. New York: Columbus: Columbus: McGraw-Hill Professional, 2006.



mathematical project-scheduling models were developed. The Critical Path Method was developed as a joint venture. And the Program Evaluation and Review Technique was developed as part of the United States Navy's Polaris missile submarine program<sup>①</sup>. These techniques quickly spread into many private enterprises.

At the same time, as project-scheduling models were being developed, technology for project cost estimating, cost management, and engineering economics was evolving. In 1956, the American Association of Cost Engineers was formed by early practitioners of project management and the associated specialties of planning and scheduling, cost estimating, and cost/schedule control.

The International Project Management Association was founded in Europe in 1967<sup>②</sup>. IPMA maintains its federal structure today and now includes member associations on every continent except Antarctica. In 1969, the Project Management Institute (PMI) was formed in the USA<sup>③</sup>. PMI publishes *A Guide to the Project Management Body of Knowledge*, which describes project management practices that are common to most projects, most of the time. PMI also offers multiple certifications.

## II. Definition and Basic Characteristics of Project

### 1. Project

A project is defined as a collaborative enterprise. Projects can be further defined as temporary rather than permanent social systems that are constituted by teams within or across organizations to accomplish particular tasks under time constraints<sup>④</sup>.

When the English language initially adopted the word, it referred to a plan of something, not to the act of actually carrying this plan out. Something performed in accordance with a project became known as an object.

At school, educational institute and independent work project is involved in a normal essay assignment. The written report that comes from the project is usually in the form of a dissertation, which will contain sections on the project's inception, analysis, findings and conclusions<sup>⑤</sup>.

Engineering projects are specifically defined by legislation, which requires that such projects should be carried out by registered engineers and/or registered engineering companies.

In project management a project consists of a temporary endeavor undertaken to create a

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① Booz Allen Hamilton. Alumni Profile: Rhonda Germany of Honeywell International, retrieved November 25, 2007.

② Bjarne Kousholt. *Project Management-Theory and Practice*. Denmark Orngreens: Nyt Teknisk Forlag, 2007.

③ F. L. Harrison, Dennis Lock. *Advanced Project Management: A Structured Approach*. Farnham: Gower Publishing, Ltd, 2004.

④ SSRN-Embedding Projects in Multiple Contexts: A Structuration Perspective by Stephan Manning. Papers.ssrn.com.

⑤ Thomas, G. *How to Do Your Research Project*. Newbury Park: Sage Publications Inc, 2009.

unique product, service or result<sup>①</sup>. Project objectives can be formulated as SMART criteria<sup>②</sup>: specific, measurable achievement, achievable, realistic and time terminated.

## **2. Project stakeholders**

Project stakeholders are those entities within or outside an organization which sponsor a project, or have an interest or a gain upon a successful completion of a project may have a positive or negative influence in the project completion.

Examples of project stakeholders include the customer, the user group, the project manager, the development team, the testers, etc.

## **3. Milestone**

Milestone is an event that receives special attention. It is often falsely put at the end of a stage to mark the completion of a work package or phase. Rather, milestones should be put before the end of a phase so that corrective actions can be taken, if problems arise, and the deliverable can be completed on time.

In addition to signaling the completion of a key deliverable, a milestone may also signify an important decision or the derivation of a critical piece of information, which outlines or affects the future of a project.

Milestones are frequently used to monitor progress, but there are limitations to their effectiveness. It is common for resources to be moved from non-critical activities to critical activities to ensure that milestones are met.

## **4. Deliverable**

Deliverable is a term used in project management to describe a tangible or intangible object produced as a result of the project that is intended to be delivered to a customer (either internal or external). A deliverable could be a report, a document, a server upgrade or any other building block of an overall project<sup>③</sup>.

A deliverable may be composed of multiple smaller deliverables. A deliverable differs from a project milestone in that a milestone is a measurement of progress toward an output whereas the deliverable is the result of the process. A deliverable also differs from a project document in that project document is typically part of a project deliverable, or a project deliverable may contain number of documents and physical things.

How are you to describe a project?

The first is one sentence to describe the project objective, positions in the project and the deliverables in the project including initiating, planning, executing, monitoring and controlling, and closing),

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<sup>①</sup> *A Guide to the Project Management Body of Knowledge (Third Edition)*. PMBOK Guide. Newtown Square: Project Management Institute, 2009.

<sup>②</sup> Carr, David, Make Sure Your Project Goals are SMART, PM Hut. Accessed 18. Oct 2009.

<sup>③</sup> Cutting, Thomas Deliverable-based Project Schedules: Part 1, PM Hut. accessed 8 November 2009.



e.g.

Initiating: Project Charter etc;

Planning: Scope Definition etc;

Executing: Team Performance Report etc;

Monitoring and Controlling: Schedule Verification Report etc;

Closing: Customer Acceptance Report etc.

Study the following brief project descriptions carefully.

Project Description One: The project's aim is to develop interactive software with mobile equipments. I was a project manager and in charge of the whole project. The phases deliverables were: Feasibility Report in Initiating Process, Mission Statement in Planning Process; Team Performance Report in Executing Process, Progress Report in Monitoring Process and User Acceptance Report in Closing Process. The software is composed of server and client, includes UID management, User management modules etc. and can read information from/to mobile communications equipments.

Project Description Two: Or the project's aim is to provide the whole solutions to software and management for hospitals. I was the manager who is responsible for the whole project. The periodic deliverables were: Outputting Implementation Solution after Internal Communication meeting in Initiating process; Composing normative document in Planning Process; Summarizing daily logs, weekly reports and project progress in Executing Process; Project Process Control and Budget Control in Monitoring Process; Customer Acceptance Report in Closing Process; the software system is based on B/S Structure, client can access server from a webpage with one fixed IP. The system contains UID management module, Cost Accounting module, Budget Management module, Logistics Management module, Fixed Assets module, Accounting module, etc.

### III. Project Life Cycle

Project Life Cycle (PLC) includes starting the project (initiating), organizing and preparing (planning), carrying out the project work (executing) and finishing the project (closing). Cost and staffing levels are low at the start, peak during intermediate phases and drop rapidly at the end.

Take the project life cycle of house building for example.

In the first stage, the house building is born and the project director is selected. Besides, the project teams are established with the initial resource is assembled. A need is identified by the funder and this result in a Request for Proposals (RFP) which describes and defines the needs and requirements. We can call this phase Initiation, in this project the funder needs to



confirm the requirements of the house-size, style, number of rooms, location, budget and so on. Moreover, in this stage, the work of the program is organized which the work breakdown structures are created. All departments know what is their work and responsibility. In this stage, the works start with very slow progress. All begin with zero. This is because; the entire departments need to have clear information about the project. Besides, the project director must know when and where they want to start the project, what is the project objective or goal, what you want to achieve in this project and finally where you can get the resources to start the project.

In the second stage, the project director of house building needs to have a clear plan about the entire project. Project director need know clearly about the budget, schedule, material, and the emergency needs, and must have a clear budget about the project. This is because the project needs the funder offering the materials. Moreover, the project director must have a schedule to make sure the entire work done on time. This schedule is to avoid any delay in those departments which can affect the project. And also there are some kinds of emergency such as weather problems. In case of raining or natural disasters the project cannot be continued. Finally, the project director must give 100% commitment because this is an important stage to make sure all the things can progress as per the schedule planed. And in detail design, all team members should report what they have done to the project director. This is because the time is closer to the deadline of the project. The project director needs to check where they are standing now. What they need to do is to make sure the entire thing is on track. By achieving those objective, all the departments should work as a team instead of as an individual. By working in a team, the department in charge can fully exchange their information about the project. Only by doing this can the department head know what problems exist and find the methods to solve the problems.

The third stage is execution and control. During the execution of the project, project will use some different types of resources and material. In the construction works, a substantial increase in resource requirements includes steel workers, carpenters, electricians, painters and so on. After the end of the project, a few other workers will be responsible for complete of landscaping work and interior decoration. This stage will result in the eventual realization of project objectives; moreover let the funder show satisfaction with the high quality of the work completed on time and under less than the budget. In this stage, the project director needs to have measures and control the project. This is because the project already at the most critical place. In this stage, the project achieves the climax because the real events happen at the present time. The project director needs to coordinate with the subordinate to update the latest information. Besides, the project director needs to take measures to determine the entire progress. Controlling the project means that the project director needs to make sure all the progress is towards the right direction.

When the project comes to the end, some activities still need to perform. The project director needs to confirm whether all the things have been delivered to the funders, all payments have been settled and all the invoices have been paid up. This is an important stage that evaluates the performance of the project. In order to know which part needs improving and in the future when similar projects are done this project can function as the reference. And also the feedback from the funder is another important part, and at the same time there are also feedbacks to propose improvement of project performance from the project team. In the last stage, the project director and team members need to close the project which includes document closing, suggestion improvement, reassignment, and dissolving team. For the suggestion improvement, all team members will review the output of the project. Finally, they will dissolve the team.

## IV. Overview of Project Management

### 1. Essentials of project management

It's time for us to make a conclusion that project management is the discipline of planning, organizing, motivating, and controlling resources to achieve specific goals. A project is a temporary endeavor with a defined beginning and end<sup>①</sup>, undertaken to meet unique goals and objectives<sup>②</sup>, typically to bring about beneficial change or added value. The temporary nature of projects stands in contrast with business as usual<sup>③</sup>, which are repetitive, permanent, or semi-permanent functional activities to produce products or services. In practice, the management of these two systems is often quite different, and as such requires the development of distinct technical skills and management strategies.

The primary challenge of project management is to achieve all of the project goals<sup>④</sup> and objectives while honoring the preconceived constraints<sup>⑤</sup>. The primary constraints are scope, time, quality and budget<sup>⑥</sup>. The secondary challenge is to optimize the allocation of necessary inputs and integrate them to meet pre-defined objectives.

### 2. Processes of project management

Project management processes include initiation, planning or design, production or execution, monitoring and controlling and closing<sup>⑦</sup>.

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① Chatfield Carl. A Short Course in Project Management. <https://support.office.com/en-us/article/A-short-course-in-project-management-19cfed57-2f85-4a44-aadc-df8482d92688?ui=en-US&rs=en-US&ad=US>.

② Nokes Sebastian. *The Definitive Guide to Project Management*. Crainer: Financial Times, 2007.

③ Paul C. Dinsmore et al. *The Right Projects Done Right!* Chichester: New York: John Wileyand Sons, 2005.

④ Lewis R. Ireland. *Project Management*. Columbus: McGraw-Hill Professional, 2006.

⑤ Joseph Phillips. *PMP Project Management Professional Study Guide*. Columbus: McGraw-Hill Professional, 2003.

⑥ PMI. *A Guide to the Project Management Body of Knowledge*. Newtown Square: Project Management Institute, 2010.

⑦ PMI. *A Guide to the Project Management Body of Knowledge*. Newtown Square: Project Management Institute, 2010.



The initiating processes<sup>①</sup> determine the nature and scope of the project<sup>②</sup>. If this stage is not performed well, it is unlikely that the project will be successful in meeting the business' needs. The initiating stage should include a plan that encompasses the following areas: analyzing the business needs/requirements in measurable goals, reviewing of the current operations, financial analysis of the costs and benefits including a budget, stakeholder analysis, including users, and support personnel for the project, project charter including costs, tasks, deliverables, and schedule.

After the initiation stage, the project is planned to an appropriate level of detail<sup>③</sup>. The main purpose is to plan time, cost and resources adequately to estimate the work needed and to effectively manage risk during project execution. Project planning generally consists of<sup>④</sup> determining how to plan, developing the scope statement, selecting the planning team, identifying deliverables and creating the work breakdown structure, identifying the activities needed to complete those deliverables and networking the activities in their logical sequence, estimating the resource requirements for the activities, estimating time and cost for activities, developing the schedule, developing the budget, risk planning and gaining formal approval to begin work.

Executing consists of the processes<sup>⑤</sup> used to complete the work defined in the project plan to accomplish the project's requirements. Execution process group includes directing and managing project execution, quality assurance of deliverables, acquiring, developing and managing project team, distributing information, managing stakeholder expectations, conducting procurement and monitoring and controlling.

Monitoring and controlling<sup>⑥</sup> consists of those processes performed to observe project execution so that potential problems can be identified in a timely manner and corrective action can be taken, when necessary, to control the execution of the project. Monitoring and controlling includes<sup>⑦</sup> measuring the ongoing project activities, monitoring the project variables against the project management plan and the project performance baseline, identifying corrective actions to address issues and risks properly, influencing the factors that could circumvent integrated change control so only approved changes are implemented.

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① Peter Nathan. *PMP certification*. California: For Dummies, 2003.

② Harold Kerzner. *Project Management: A Systems Approach to Planning, Scheduling, and Controlling (8th Ed.)*. New York: Wiley, 2003.

③ Peter Nathan. *PMP Certification*. California: For Dummies, 2003.

④ James P. Lewis. *The Project Manager's Desk Reference: A Comprehensive Guide to Project Planning, Scheduling, Evaluation, and Systems*. Columbus: McGraw-Hill, 2000.

⑤ PMI. *A Guide to the Project Management Body of Knowledge*. Newtown Square: Project Management Institute, 2010.

⑥ PMI. *A Guide to the Project Management Body of Knowledge*. Newtown Square: Project Management Institute, 2010.

⑦ James P. Lewis. *The Project Manager's Desk Reference: A Comprehensive Guide to Project Planning, Scheduling, Evaluation, and Systems*. Columbus: McGraw-Hill, 2000.





Project maintenance is an ongoing process, and it includes<sup>①</sup> continuing support of end-users, correction of errors, updates of the software over time, monitoring and controlling cycle. In this stage, auditors should pay attention to how effectively and quickly user problems are resolved.

Closing includes<sup>②</sup> the formal acceptance of the project and the ending thereof. Administrative activities include the archiving of the files and documenting lessons learned.

This phase consists of<sup>③</sup> project close to finalize all activities across all of the process groups to formally close the project or a project phase, contract closure to complete and settle each contract and close each contract applicable to the project or project phase.

Project controlling should be established as an independent function in project management. It implements verification and controlling function during the processing of a project in order to reinforce the defined performance and formal goals<sup>④</sup>. The tasks of project controlling are also the creation of infrastructure for the supply of the right information and its update, the establishment of a way to communicate disparities of project parameters, the development of project information technology based on an intranet or the determination of a project key performance index system (KPI), divergence analyses and generation of proposals for potential project regulations<sup>⑤</sup>, the establishment of methods to accomplish an appropriate project structure, project workflow organization, project control and governance, creation of transparency among the project parameters<sup>⑥</sup>.

Fulfillment and implementation of these tasks can be achieved by applying specific methods and instruments of project controlling. The following methods of project controlling can be applied: investment analysis, cost-benefit analyses, value benefit analysis, expert surveys, simulation calculations, risk-profile analyses, surcharge calculations, milestone trend analysis, cost trend analysis, and target/actual-comparison<sup>⑦</sup>.

Project control is that element of a project that keeps it on-track, on-time and within budget<sup>⑧</sup>. Project control begins early in the project with planning and ends late in the project with post-implementation review, having a thorough involvement of each step in the process. Control systems are needed for cost, risk, quality, communication, time, change, procurement, and human resources.

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① PMI. *A Guide to the Project Management Body of Knowledge*. Newtown Square: Project Management Institute, 2010.

② Peter Nathan. *PMP Certification*. California: For Dummies, 2003.

③ PMI. *A Guide to the Project Management Body of Knowledge*. Newtown Square: Project Management Institute, 2010.

④ Jörg Becker. *Process Management: A Guide for the Design of Business Processes*. Springer Publishing Company, 2003.

⑤ Bernhard Schlagheck. *Object Oriented Reference Model*. Prozess Informations Management and Control, 2000.

⑥ Josef E. Riedl. *Projekt-Controlling in Forschung und Entwicklung*. Springer Berlin Heidelberg, 1990.

⑦ Steinle, Bruch, Lawa. *Projektmanagement*. FAZ Verlagsbereich Wirtschaftsbücher, 1995.

⑧ James P. Lewis. *The Project Manager's Desk Reference: A Comprehensive Guide to Project Planning, Scheduling, Evaluation, and Systems*. Columbus: McGraw-Hill, 2000.