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China Student Edition

项目管理

现代方法

Project Management

A Contemporary Approach

（美）蒂莫西·J. 克洛彭博格（Timothy J. Kloppenborg） 著

清华大学出版社

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为了适应经济全球化的发展趋势，满足国内广大读者了解、学习和借鉴国外先进管理经验和掌握经济理论前沿动态的需要，清华大学出版社与国外著名出版公司合作影印出版一系列英文版经济管理方面的图书。我们所选择的图书，基本上是已再版多次、在国外深受欢迎、并被广泛采用的优秀教材，绝大部分是该领域中较具权威性的经典之作。

由于原作者所处国家的政治、经济和文化背景等与我国不同，对书中所持观点，敬请广大读者在阅读过程中注意加以分析和鉴别。

根据我国的教学实际情况和外方出版社的要求，我们在影印过程中删掉了第3章“组织能力”、第10章“项目风险规划”和第15章“完成项目”。我们在采用原书页码的同时，还按顺序编制了新的页码，望读者予以注意。书中某些习题需要用到的数据资料，请访问清华大学出版社网站 www.tup.com.cn 搜索本书即可。

我们期望这套影印书的出版对我国经济科学的发展能有所帮助，对我国经济管理专业的教学能有所促进。

欢迎广大读者给我们提出宝贵的意见和建议，同时也欢迎有关的专业人士向我们推荐您所接触到的国外优秀图书。

清华大学出版社

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英/双语教学的成功路径与商科英文原版教材的效用

（代序）

在我国高校，用英语或双语教授专业课程（以下简称：英/双语教学）始于改革开放引进热潮，历经 30 年，虽发展不快，仍在缓慢推进。20 世纪 80 年代，改革开放后留学归来的教育界学者们不仅引进了各学科先进的研究成果，也随之引进了西方高校的教材。以清华大学出版社为领军的国内出版社适时地引进了西方优秀教材的影印版，推动了一些高校开始在专业课程中开展英/双语教学。2007 年以来，国家教育质量工程专设的“国家高校双语教学示范课程建设点”的评定项目被视为政府教育发展的政策风向标，正有力地推动着高校英/双语教学的发展。

但对英/双语教学的必要性，我国高校内部一直争议不断。争议首先围绕着中国人用英语教学的必要性。在公认英语是目前世界通用语言的前提下，英/双语教学的必要性取决于我国高校师生是否有必要及时汲取世界最新的知识和研究成果。答案是不言而喻的。况且英/双语教学省却了翻译过程，可以避免常见的信息减损和曲解问题。不过，信息发布者——教师的英语演讲能力和信息接收者——学生的英语解读能力不足又成为开展英/双语教学的障碍。因而常见的反对意见是，开展英/双语教学，课堂教学内容就会缩水，因为讲授者和听众都得花费精力和时间解译内容。如此看来，我国开展英/双语教学的高校教师必须应对挑战，洞察在我国现有条件下用英文原版教材开展英/双语教学的利和弊，并找到可行的扬长避短的路径。

在经济开放和全球化的大趋势推动下，我国中小学英语教学分量加重，英语普及程度逐年提高，高校新生的英语基础愈益扎实；教师的英语能力也随着师资的新陈代谢而日见增强。这一趋势无疑在为英/双语教学营造越来越有利的条件。尽管如此，不同于以英语为主要语言或官方语言的一些国家，英语在我国的普及率仍较低。在青少年中，英语的普及程度和英语应用能力还仅处于初级水平；高校中能用英语演讲的教师尚属少数，且熟练程度还有待大幅提高。这样的师生英语基础，使得英/双语教学面临巨大的挑战。

同时，在多数的中国高校课堂里，教学任务多被视为逐章讲解某本教材的内容。本土中文教材通常是 400 ~ 500 页的 32 开本，含理论框架、主要知识点、计算方法和习题，但案例和故事不在其中，多由教师在讲解时添加，以演示和诠释理论要点。迄今仍然普遍盛行的“填鸭式”、“满堂灌”的传统教学法侧重于传授知识，从多数评教指标可见，只要学生感觉教师讲得精彩、有条理、能解惑，就算教学成功。

而引进的国外教材篇幅通常较长，16 开大本，500~800 页。习惯于上述传统教学法和评价标准的人们自然会产生一个疑问：在有限的课时内，这么厚的教材，怎么讲得完？其实，发达国家多数高校对学生阅读量的要求远远大于我国高校（即使是中文课本和资料），名校更是如此。它们的教材不仅涵盖理论框架和基本概念，而且富含长短不一、详简各异的演示性案例、故事和大量习题，总之它便于学生自学。课堂讲解只占一半课时，其余课时常被用于师生讨论和互动。于是，教师的讲解主要是勾勒理

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论框架，阐释重点和难点，还需针对事先布置的阅读资料和讨论题，引导学生展开讨论。可见，大厚本的教材适合于能力培训教学法。两者相辅相成，致力于调动学生的主动性：他们必须大量阅读和思考，才能在课堂上有上好的表现，真正成为学习的主人。结果，他们的能力获得了必要和切实的磨炼。

由此可见，英/双语教学不只是教学语言的改变，它可以达到三重效用：传授专业知识；传授英语知识；同时训练专业方法和英语的应用技能。也因此，一些非英语国家的高校不惜成本，开展英/双语教学，使用与之相配的教材。对我国高校来说，要想成功开展英/双语教学，恐怕首先需要改变传统的教育思想和教学方法。换言之，如果高校想要使教育、教学接近世界先进水准，用英文原版影印教材开展英/双语教学是有效的途径。

迄今为止，原版英文教材的缺点也很明显。鉴于发达国家的作者是以其母国为背景，多数教材不涉及中国国情。教师必须在教学中紧密结合中国国情，提供相关案例、资料和思考讨论题，适时引导师生思辨现有理论的普适性，激励师生发现和创作适合我国国情的经济学、管理学、营销学规律。在我国作者编写和出版足量的优质英文教材之前，这些额外的工作必须由开展英/双语教学的教师来承担。

古今中外，成才之士都乐于阅读和探索，而这种氛围却在当今我国的大学校园里愈见淡化。加之中国学生相对薄弱的英语基础，目前英/双语教学仍面临很大的挑战："填鸭式"的讲授与之相悖；仅靠课堂讲授和互动也很难奏效。但如能培养学生阅读和探索真理的兴趣，并营造一个全方位的孵化温床或生态环境，英/双语教学是有望成功的。根据能力培育过程的所需，这个生态环境包含师生对教育、教学的共识，好学求知的校风，富有挑战和师生互动的课堂教学，从课外讲座、项目操作到校园竞赛等第二课堂活动，便于师生交流的校园互联网等。

要做到这些，教师亟待与时俱进。随着师资的年轻化和高学历化，如今年轻教师的英语基础更好。但逆水行舟，不进则退。英语能力的进退取决于使用频率的多寡，其实英/双语教学过程既是加强英语使用、提高英语能力，也是汲取世界新知的最佳机会。不过，这一过程通常比用汉语教学的付出大得多，且因学生也需成倍地付出，英/双语教学的课程不容易像汉语教学课程那样容易在短期内获得学生的好评。因此给予英/双语教学的教师足够的激励成为生态环境的首要组成部分；缺乏对教师的足够激励，上述英/双语教学的生态环境就无法营造。

诚然，在教育体制和环境不够理想的情况下，教师和学生仍然有个人自训和奋斗的条件。英语原版教材影印版在我国的出版和更新就是对英/双语教学的及时支持。清华大学出版社近期又有一批英文原版影印教材出版，相信必将更进一步推动英/双语教学的发展。如今，已有一些本土高校的教师与英语国家的教师合著英文教材；在可见的将来，还会有中国教师编写发行到世界各地的英文教材。总之，及时用好英文原版影印教材，编写优质的英文教材是我国高校教师的历史责任。

愿英/双语教学的师资队伍愈益壮大，愿英/双语教学更加有力地推动我国教学方法与国际接轨，愿我国高校各级学生在英/双语教学中受益良多，茁壮成长！

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While project managers today still need to use many techniques that have stood the test of 20 to 50 years of time, they increasingly also need to know how to deal with rapid change. In addition, they need to understand the business need for a project and sort through multiple conflicting stakeholder demands, a myriad of communications issues, global and virtual project teams, modern approaches to quality improvement, and many other issues that are more challenging than in previous times.

Contemporary project management utilizes the tried and true project management techniques with modern improvements such as the most current versions of Microsoft® Office Project 2007 and *A Guide to the Project Management Body of Knowledge (PMBOK® Guide).* Contemporary project management also uses many tools and understandings that come from modern approaches to quality, communications, expanded role definitions, leadership principles, and many other sources. Contemporary project management is scalable, using simple versions of important techniques on small projects and more involved versions on more complex projects.

Organization of Topics

The book is divided into three major parts.

Part 1, "Organizing and Initiating Projects," deals with both the environment in which projects are conducted and getting a project officially approved.

- Chapter 1 introduces contemporary project management by first tracing the history of project management and then discussing what makes a project different than an ongoing operation. Various frameworks that help one understand projects—such as the *PMBOK® Guide—are* introduced as well as the executive-, managerial-, and associate-level roles.
- Chapter 2 discusses how projects support and are an outgrowth of strategic planning, how a portfolio of projects is selected, how a client company selects a contractor company to conduct a project, and how a contractor company secures project opportunities from client companies.
- Chapter 3 deals with organizational capability issues of structure, life cycle, culture, and roles. The choices parent organizations make in each of these provide both opportunities and limitations in how projects can be conducted.
- Chapter 4 presents project charters in a step-by-step fashion. Short, powerful charters help all key participants to develop a common understanding of all key project issues and components at a high level and then to formally commit to the project. Charters have become nearly universal in initiating projects in recent years.

Part 2, "Planning Projects," deals with all aspects of project planning as defined in the *PMBOK® Guide.*

- Chapter 5 introduces the methods for understanding and prioritizing various stakeholder demands and how to build constructive relationships with them. Since many projects are less successful than desired due to poor communications, detailed communication planning techniques are introduced along with meeting management and Microsoft® Office Project 2007 as a communications tool.

- Chapter 6 helps students understand how to determine the amount of work the project will entail. Specifically covered are methods for determining the scope of both the project work and outputs, the work breakdown structure (WBS) that is used to ensure nothing is left out, and how the WBS is portrayed using Microsoft® Office Project 2007.
- Chapter 7 is the first scheduling chapter. It shows how to schedule activities by identifying, sequencing, and estimating the durations for each activity. Then critical path project schedules are developed, methods are shown to deal with uncertainty in time estimates, Gantt charts are introduced for easier communications, and Microsoft® Office Project 2007 is used to automate the schedule development and communications.
- Chapter 8 is the other scheduling chapter. Once the critical path schedule is determined, staff management plans are developed, project team composition issues are considered, resources are assigned to activities, and resource overloads are identified and handled. Critical chain project management, crashing, and fast tracking are introduced, and all resource scheduling is demonstrated with Microsoft® Office Project 2007.
- Chapter 9 deals with project budgeting. Cost planning, cost estimating, cost budgeting, and establishing cost controls are shown. Microsoft® Office Project 2007 is used for both developing bottom-up and summary project budgets.
- Chapter 10 demonstrates project risk planning. It includes risk management planning, methods for identifying risks, establishing a risk register, analyzing risks for probability and impact, and deciding how to respond to each risk with contingency plans for major risks and awareness for minor risks.
- Chapter 11 starts by covering project quality planning. This includes explaining the development of modern quality concepts and how they distill into core project quality demands. Then it covers how to develop a project quality plan and how to utilize the simple project quality tools. Chapter 11 then ties all of the planning chapters together with a project kickoff meeting, a baselined project plan, and how Microsoft® Office Project 2007 can be used to establish and maintain the baseline.

Part 3, "Performing Projects," discusses the various aspects that must be managed simultaneously while the project is being conducted.

- Chapter 12 deals with project supply chain management issues. Some of these issues such as developing the procurement management plan and qualifying and selecting vendors are planning issues. For simplicity, they are covered in one chapter with the issues of managing suppliers and lean project management.
- Chapter 13 deals with leading and managing both the project team and stakeholders. It includes acquiring and developing the project team, assessing both potential and performance of team members and the team as a whole, various types of power a project manager can use, and how to deal productively with project conflict.
- Chapter 14 is concerned with determining project results. This chapter starts with a balanced scorecard approach to controlling projects. Internal project issues covered include risk, change, and information. Customer issues are stakeholder satisfaction, scope, and quality. Financial issues are cost and schedule, including how to use Microsoft® Office Project 2007 for control.
- Chapter 15 deals with how to end a project—either early or on time. Growth/innovation issues of knowledge management and development of standards are covered. Also discussed are securing customer feedback and approval, administrative closure, reassigning workers, contract closure, celebrating success, and providing a smooth transition and ongoing support to those using the project results.

Distinctive Features

- **Student-oriented, measurable learning objectives**. Each chapter begins with a listing of the most important points students should learn. The chapter material, end-of-chapter questions and problems, PowerPoint® slides, and test questions have all been developed to correlate to a specific objective.
- ***PMBOK® Guide* approach**. All *PMBOK® Guide* knowledge areas and processes are specifically included. All glossary definitions are from the *PMBOK® Guide.* This consistency with the established standard gives students a major leg up if they decide to become a Certified Project Management Professional (PMP®).
- **Microsoft® Office Project 2007 is fully integrated into the fabric of seven chapters.** In each case, the chapter material is introduced in a simple, practical manner. Then the techniques are demonstrated in a by-hand fashion. Finally, a demonstration of how to automate the techniques using Microsoft® Office Project 2007 is shown in a step-by-step manner with numerous screen captures. On all screen captures, critical path activities are shown in contrasting color for emphasis.
- **Actual project as learning vehicle**. One section at the end of each chapter lists deliverables for students to create (in teams or individually) for a real project. These assignments have been refined over the last decade while working with the local Project Management Institute PMI® chapter that provides a panel of PMP® judges to evaluate projects from a practical point of view. Students are encouraged to keep clean copies of all deliverables so they can demonstrate their project skills in job interviews.
- **Blend of classical and modern methods**. Proven methods developed over the past half century are combined with exciting new methods that are emerging from both industry and research.
- **Executive, managerial, and associate roles**. This book covers the responsibilities of many individuals who can have an impact on projects so that aspiring project managers can understand not only their own role, but also those with which they need to deal.
- **Balanced scorecard approach**. Many factors are included in how project success is measured and how project results are determined. An adaptation of the balanced scorecard helps students understand how these fit together.

Distinctive Approach

This book covers the topics of contemporary project management. It was also developed using contemporary project management methods. For example, when considering the topic of dealing with multiple stakeholders, every chapter was reviewed by students, practitioners, and academics. This forced student learning, practitioner realism, academic research, and teaching perspectives to be simultaneously considered.

The practical examples and practitioner reviewers came from many industries and from many sizes and types of projects to promote the scalability and universality of contemporary project management techniques.

Instructor and Student Support Materials

Instructor's Manual with Solutions

Prepared by Tim Kloppenborg and based on his years of experience facilitating the student learning experience in his own Project Management classes, the *Instructor's Manual with Solutions* includes, for each chapter, an overview of learning objectives,

detailed chapter outlines, teaching recommendations, and many detailed suggestions for implementing community-based projects into your Project Management class. Solutions are also provided for all of the end-of-chapter content. The *Instructor's Manual with Solutions* is available on the Web site international.cengage.com.

Test Bank

Prepared by Kevin Grant of the University of Texas at San Antonio, this comprehensive *Test Bank* is organized around each chapter's learning objectives. Every test item is labeled according to its difficulty level and the major topical heading within the textbook to which it relates. This allows instructors to quickly construct effective tests that emphasize the concepts most significant for their course. The *Test Bank* includes true/false, multiple-choice, essay questions, and quantitative problems for each chapter. The *Test Bank* is available on the Web site international.cengage.com.

ExamView® Testing Software

Exam*View*® Computerized Testing Software, located on the Web site international.cengage.com, contains all of the questions in the *Test Bank.* This program is an easy-to-use test creation software compatible with Microsoft Windows®. Instructors can add or edit questions, instructions, and answers, and select questions by previewing them on the screen, selecting them randomly, or selecting them by number. Instructors can also create and administer quizzes online, whether over the Internet, a local area network (LAN), or a wide area network (WAN). Contact your South-Western Cengage Learning sales representative for ordering information.

PowerPoint® Presentation

Prepared by Deborah Tesch of Xavier University, the PowerPoint® Presentation provides comprehensive coverage of each chapter's essential concepts in a clean, concise format. Key exhibits from the textbook are also included to enhance in-class illustration and discussion of important concepts. Instructors can easily customize the PowerPoint® Presentation to better fit the needs of their classroom. It is accessible on the Web site international.cengage.com.

Microsoft® Office Project 2007 Student CD-ROM

New copies of *Project Management: A Contemporary Approach* include a trial version of Microsoft® Project 2007 at no additional cost. The practical use of this key project management application is fully integrated into seven chapters of the textbook.

Student Data Sets CD-ROM

New copies of *Project Management: A Contemporary Approach* include, at no additional cost, the Student Data Sets CD-ROM containing Microsoft Excel® data used in the completion of select end-of-chapter problems.

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