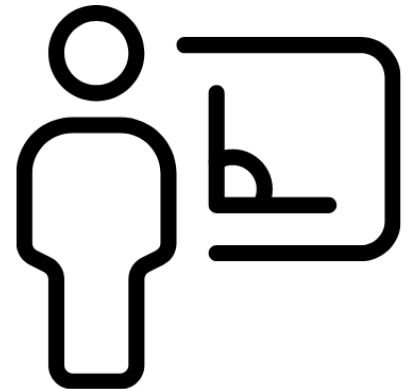


# Instructors Guide



On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



*Trying to manage a project without project management, is like trying to play a football game without a game plan.*

**Karen Tate**

## Module Two: Project Integration Management



Project Integration Management is about ensuring that the processes in the project (scope, schedule, cost, quality, etc.) are unified. It is important to recognize that these processes depend on each other and cannot occur independently. Although this requires a lot of work, project integration management is crucial to the successful production of the final deliverable.

### Definition



The word “integration” is usually used in the context of coordination, communication, and other interrelationship type goals. Project integration management is defined as the processes that are necessary to successfully coordinate the activities of the project management process group.

|                        |  |
|------------------------|--|
| <b>Estimated Time</b>  | <b>7 minutes</b>   |
| <b>Topic Objective</b> | Review the definition of Project Integration Management.   |
| <b>Topic Summary</b>   | <b>Definition</b><br>Understand the overall goal of integration management before delving into its processes, steps, and examples. |

|                             |  |
|-----------------------------|--|
| <b>Materials Required</b>   | <b>Flipchart/Whiteboard &amp; markers</b>  |
| <b>Planning Checklist</b>   | None   |
| <b>Recommended Activity</b> | As a group, discuss the definition of Project Integration Management. Write participants' responses. |
| <b>Stories to Share</b>     | Share any personal, relevant stories.  |
| <b>Delivery Tips</b>        | Encourage everyone to participate.   |
| <b>Review Questions</b>     | What does "integration" typically refer to?  |

## Processes



The processes that are involved in this integration have differing goals and focuses and should be utilized from the beginning of the project until the end. The processes listed below are all necessary and should not be ignored, to manage the project effectively and efficiently.

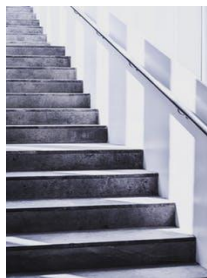
Project Integration Management Processes include:

- Developing a charter for the project that recognizes the existence of the project and its management's authority.
- Developing a management plan including all of the project's plans into one document.
- Defining the project knowledge that will be necessary.
- Managing the project's work through direction, monitoring, and control.
- Performing all revisions and/or changes that may be necessary to the course of the project.
- Closing of the project phases, contracts, and other activities, when complete.

|                           |  |
|---------------------------|--|
| <b>Estimated Time</b>     | <b>7 minutes</b>   |
| <b>Topic Objective</b>    | Review the role of different processes of project integration management.                |
| <b>Topic Summary</b>      | <b>Processes</b><br>Discuss different essential processes needed for project management. |
| <b>Materials Required</b> | <b>Flipchart/Whiteboard &amp; markers</b>  |

|                             |  |
|-----------------------------|--|
| <b>Planning Checklist</b>   | None   |
| <b>Recommended Activity</b> | List and discuss different processes that will be necessary for successful projects. |
| <b>Stories to Share</b>     | Share any personal, relevant stories.  |
| <b>Delivery Tips</b>        | Encourage everyone to participate.   |
| <b>Review Questions</b>     | Why is it important to have these processes?   |

## Specific Steps



One of the first steps to initiating the project and its management is the creation of a project charter. This business document is an agreement to work towards a common stated goal, under agreed upon stipulations. The charter should contain not only the requirements of the project, but also the risks and the milestones that will need to be achieved at the specified times.

Another of the recommended processes is the management of knowledge. This refers to assessing the knowledge that the team already possesses, and the research and collecting of new knowledge that can benefit the project and the processes. There are many ways to gain this new knowledge, through networking, shadowing, community meetings, etc.

One of the processes to this integration is the plans for changes that will inevitably arise during the course of the project. The general steps for handling these changes are stated below:

- Identify the changes and thoroughly document these changes to the project.
- Review the changes for rejection or approval and determine any decisions that need to be made in relation to these actions.
- Further monitor and track these changes and the actions that are taken in response.

|                           |   |
|---------------------------|---|
| <b>Estimated Time</b>     | <b>7 minutes</b>  |
| <b>Topic Objective</b>    | Review the different steps to project integration management.   |
| <b>Topic Summary</b>      | <b>Specific Steps</b><br>Discuss the specific steps and processes necessary for the project's management. |
| <b>Materials Required</b> | <b>Flipchart/Whiteboard and markers</b>   |
| <b>Planning Checklist</b> | None  |

|                             |  |
|-----------------------------|--|
| <b>Recommended Activity</b> | List and discuss how to handle the management of project knowledge.              |
| <b>Stories to Share</b>     | Share any personal, relevant stories.  |
| <b>Delivery Tips</b>        | Encourage everyone to participate.   |
| <b>Review Questions</b>     | What are the proper steps to handling the changes that occur during the project? |

## Examples



A project management plan is one of the critical processes to the project management integration. This document is the step-by-step plans for each of the components of the project. This plan needs to include all the following, but not limited to:

- Scope management plan and cost management plan
- Quality requirements plan
- Communications plan and resources plan
- Scheduling plan and project life cycle

There must be a definitive goal to the project, and one of the project management necessities is the closure of the project. There are several steps to this process and each one is required to ensure that the entire project's needs have been fulfilled, including:

- Ensure that all documents and other deliverables are up-to-date and completed.
- Confirm that all changes to the project have been posted.
- Close all accounts that have been opened in relation to the project.
- Reassign all personnel.

|                           |   |
|---------------------------|---|
| <b>Estimated Time</b>     | <b>7 minutes</b>  |
| <b>Topic Objective</b>    | Review specific processes and activities involved in project integration.                   |
| <b>Topic Summary</b>      | <b>Specific Examples</b><br>Discuss planning the project and closing the project processes. |
| <b>Materials Required</b> | <a href="#">Worksheet 1: Integration Process Examples</a>                                   |
| <b>Planning Checklist</b> | None  |

|                             |   |
|-----------------------------|---|
| <b>Recommended Activity</b> | Complete the worksheet individually. Share your answers with the rest of the group. |
| <b>Stories to Share</b>     | Share any personal, relevant stories.   |
| <b>Delivery Tips</b>        | Encourage everyone to participate.  |
| <b>Review Questions</b>     | Why are these processes critical to the successful integration of the project?      |

## Practical Illustration



Matt and Susan are discussing the Project Integration Management area before starting the project.

Matt stated that he understands that their goal is to coordinate all aspects of the project, but he's not quite sure of all the aspects that must be included. Susan gives a brief breakdown of the processes as:

- Developing a charter for the project that recognizes the existence of the project and its management's authority.
- Developing a management plan including all of the project's plans into one document.
- Defining the project knowledge that will be necessary.
- Managing the project's work through direction, monitoring, and control.
- Performing all revisions and/or changes that may be necessary to the course of the project.
- Closing of the project phases, contracts, and other activities, when complete.

This refreshed Matt's memory in terms of the specific steps that are taken with regard to each process.

Once Susan realized that Matt was versed in the steps associated with Project Integration Management, the two furthered their discussion by writing examples of tasks that are completed under each step.

## Module Two: Review Questions

1.) Integration is typically thought of in several contexts. According to the module, which is not one of them?

- a) Coordination
- b) Cost
- c) Communication
- d) Interrelationship goals

Project integration management is defined as the processes that are necessary to successfully coordinate the activities of the project management process group. This does not include cost.

2.) Project integration management is defined as the \_\_\_\_ necessary to successfully coordinate.

- a) Examples
- b) Specific steps
- c) Processes
- d) Time

According to the module, project integration management is defined as the processes that are necessary to successfully coordinate the activities of the project management process group.

3.) Project integration management focuses on all the below areas, except:

- a) Cost versus value analysis
- b) Defining the project charter, standards, and goals
- c) Closing processes and steps such as delivery of product/service
- d) Managing the work performed on the project

Cost versus value analysis is a part of Project Cost Management.

4.) Which of the below listed processes is not part of the project integration management?

- a) Develop a project charter
- b) Develop a management plan
- c) Define the necessary project knowledge
- d) Create the work breakdown structure (WBS)

The creation and use of the WBS is not part of this phase of the project management. This is part of the Project Scope Management phase.

5.) What is a project charter?

- a) An informal statement that explains the budget of the project
- b) A timeline for the completion of the project
- c) A formal statement that explains the budget of the project
- d) An agreement to work towards a common stated goal

This business document is an agreement to work towards a common stated goal, under agreed upon stipulations. The charter should contain not only the requirements of the project, but also the risks and the milestones that will need to be achieved at the specified times.

6.) Which of these is mentioned in the module as a way to gain new knowledge?

- a) Cold calling
- b) Face-to-face, one-on-one conversations
- c) Networking
- d) Warm leads

There are many ways to gain this new knowledge, through networking, shadowing, community meetings, etc.

7.) Which of these should be included in a project management plan?

- a) Scope management plan and cost management plan
- b) Quality requirements plan
- c) Communications plan and resources plan
- d) All of the above

In addition to the above, the scheduling plan and project life cycle are included in the project management plan.

8.) Which of these is NOT included in the closure of the project?

- a) Ensure that all documents and other deliverables are up-to-date
- b) Take note of the accounts that are still open, in relation to the project
- c) Confirm that all changes to the project have been posted
- d) Reassign all personnel

At the closure of the project, you must close all accounts that have been opened, in relation to the project.



9.) Project Integration Management Processes include closing of \_\_\_\_.

- a) Phases
- b) Activities
- c) Contracts
- d) All of the above

Project Integration Management Processes include closing of the project phases, contracts, and other activities, when complete.

10.) Project Integration Management Processes include managing the project's work through \_\_\_\_.

- a) Direction
- b) Monitoring
- c) Control
- d) All of the above

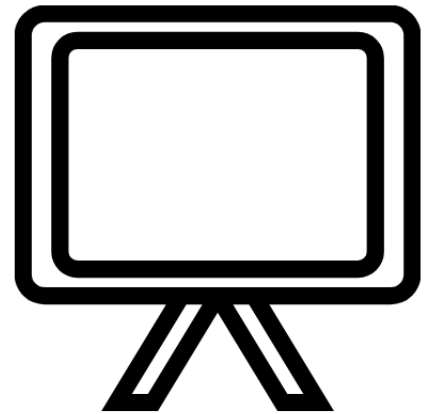
Project Integration Management Processes include managing the project's work through direction, monitoring, and control.

# PowerPoint Slides



Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide.

PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.





“

*Trying to manage a project without project management, is like trying to play a football game without a game plan.*

*Karen Tate*

## MODULE TWO

# Project Integration Management

Project Integration Management is about ensuring that the processes in the project (scope, schedule, cost, quality, etc.) are unified.



## Definition

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The processes that are necessary to successfully coordinate the activities of the project management process group.

## Processes

---

- Defining the project knowledge that will be necessary.
- Managing the project's work through direction, monitoring, and control.





## Specific Steps

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One of the first steps to initiating the project and its management is the creation of a project charter.

## Examples

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- Quality requirements plan
- Communications plan and resources plan
- Scheduling plan and project life cycle



## Practical Illustration



- Definition
- Processes
- Specific Steps
- Examples

## Module Two: Review Questions

1. Integration is typically thought of in several contexts. According to the module, which is not one of them?

A. Coordination

B. Cost

C. Communication

D. Interrelationship goals

# Quick Reference Sheets



Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.





### Definition

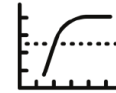
The project schedule management is critical to the timely closure of the project. Without detailed management of the deadlines, milestones, and the activities and their sequences that are required to deliver the desired products or services, they may not come to fruition. The project schedule management is a detailed report that breaks down the timeframes needed to efficiently and effectively progress through the project.



### Examples

When managing the schedule of a project, estimations of work, efforts, resources, etc. are extremely important. Some of the factors for consideration during these estimations are:

The law of diminishing returns



Motivation of the team



Resources available



Advances in technology



The scheduling of activities revolves around many factors including the resources necessary and their availability. Resource optimization is often used to revise activity start and end dates, according to the resource availability.



## Specific Steps

Determining the mandatory dependencies is essential to project schedule management. Mandatory dependencies are actions that are dependent on previous actions. As an example, the paint cannot be scheduled until after the product is assembled. Discretionary dependencies are based on the “best practices” for a desired outcome, when another method is available.

Estimating activity durations is also a focus of this phase of the project management. This process requires the considerations of the skill levels of the team members, resources that will be required, along with the techniques that will be used to accomplish the required tasks. This estimation is based on the amount of effort to complete the activity and the available resources to determine the number of work periods that will be necessary.



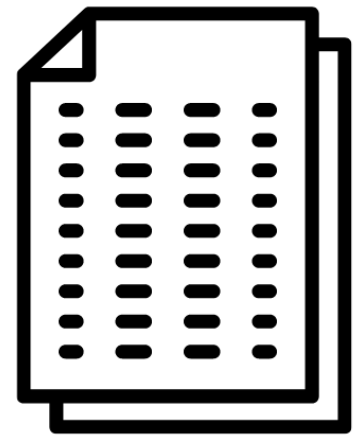
# Handouts



Each course is provided with a wide range of worksheets.

Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.



## Sample Worksheet 1

# *Integration Process Examples*

Use this worksheet to examine the necessary processes. Describe the requirements of each of the processes listed below.

**After the charter has been developed, a project plan is needed. What are the processes that are included in the project management plan?**

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**Which areas need to be examined during the project closing processes?**

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## **Icebreaker: A New Leader**

### **PURPOSE**

To help participants get acquainted and start talking to each other.

### **MATERIALS REQUIRED**

1. Index cards

### **PREPARATION**

Write the name of a different famous person on five or six index cards. Some examples: Madonna, Tiger Woods, Lance Armstrong, Nelson Mandela, Bill Gates, Angelina Jolie.

Divide participants into groups of four to six. Give each group one of the cards.

### **ACTIVITY**

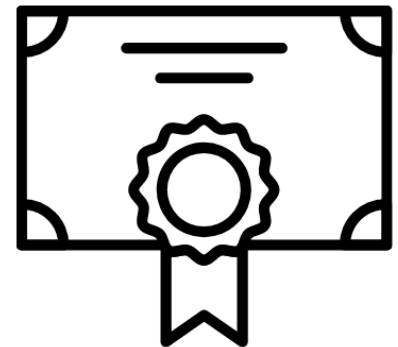
Tell participants that the president of their company (or the head of their department) has resigned and the position is now being taken over by the person on their index card. Ask each group to think of one characteristic of this person that will help him or her do well in this new role.

After a few minutes, ask the groups to report on what they decided.

# Certificate of Completion



Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION

**[Name]**

*Has mastered the course*  
*Project Management 6<sup>th</sup> Edition*

Awarded this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Presenter Name and Title

\_\_\_\_\_