Course Overview

The Challenge

Establishing solid project baselines for scope, time and cost and then using them as the basis for managing and reporting on the project are some of the most important tasks performed by any Project Manager. When done well, this work serves as a powerful driver for project success. However, this approach will only work if an effective change control process has been put into effect. Without change control, any project can spiral into disaster.

The Solution

Controlling Change to Scope and Requirements provides two days of practical, hands-on training in essential project management concepts and techniques. Participants are shown how to set the stage for effective project control with a well written project charter, and then follow up with detailed scope statement, requirements documentation, schedule and budget. Participants discuss how to establish project baselines, and then explore the details of formal change control. The benefits of change control on both project delivery and on the business value that follows the project are thoroughly examined. The tools and techniques presented are field tested and have been proven to promote project success. The course format is truly multimodal with a mixture of exercises, group discussions, and lecture. All participants return to their workplace better equipped to bring their projects to a successful conclusion. Topics covered in this course include:

- Change control overview
- Change control with a product lifecycle perspective
- How change control supports project success
- Three primary change control strategies
- How to minimize the need for change
    - Setting scope boundaries in a project charter
    - Controlling the preliminary scope definition
    - Defining scope, schedule and budget
    - Importance of project baselines
    - Baselines require solid project plans
- How to manage change when it occurs
    - Implementing project change control
    - The tools of change control
    - Minimizing change through effective requirements management
    - Managing stakeholder expectations about the impact of change requests
    - Managing baselines
- How to embrace change when it adds value
    - Evaluating change requests for value
    - Quantifying value with an Opportunity Register
    - Using the Opportunity Screen

- Change control success factors

Who Should Attend?

Project Managers who want an in-depth look at crucial concepts and techniques; new project managers looking for a jump start in their new profession; newly assigned project managers and team leads; managers of project mangers; functional managers with project responsibility; and PMO/COE staff.

Prerequisites

This course assumes that participants have participated in some projects and have some experience leading small projects or project teams. Prior PM training is helpful but not required.

Course Information

- **Duration:** 2 days. Can be customized upon request.
- **Typical Class Size:** 8 to 24 attendees
- **Participants receive:**
    - PMP®-certified instruction
    - Comprehensive Student Guide
    - CD packed with high quality Project Management templates
    - Certificate of Participation

Course Outline

Introduction

- The nature of project change
- Definition of change control
- Three primary change control strategies
- How change control supports successful delivery
- How change control protects post-project Business Value
- Other benefits of controlling change

Minimizing the Need for Change

- Initiation Phase
    - How the Project Charter sets the stage for change control
    - Defining business value and project objectives
    - Setting preliminary scope boundaries
    - Stakeholder buy-in to change control
    - Impact of effective estimation
- Planning Phase
    - Including the perspective of stakeholders
    - Thorough project planning: Scope and Requirement
    - Importance of the Work Breakdown Structure
    - Value of a structured requirements process
    - Developing verified and validated requirements
    - The Scope Statement
    - How definitive project baselines enable effective change control
    - Planning for Transition to minimize last minute changes
    - How effective risk management promotes control of change

- o   Business Value planning

Change Control Overview

- Developing a change control plan
- The work of change control
- Tools of change control
    - o   Change request form
    - o   Impact analysis
    - o   Change control log
    - o   The change authority

Controlling Change When It Occurs

- Managing change to scope and requirements
- Defending the preliminary scope definition
- Negotiating to keep scope, time and cost in balance
- Sources of project change
- Managing change requests
    - o   Using business value as a guide to change control
    - o   Managing stakeholder expectations about the impact of change
    - o   Negotiating scope, time and cost interdependencies
    - o   Updating project documents
- Managing requirements
    - o   Requirements change management
    - o   Tracing as a change control tool
    - o   Using the Requirements traceability matrix
- Dealing with mandates
- Change and risk
- Managing baselines
- Working with a vendor's change control system
- Challenges to the enforcement of change control
- Reporting project changes to stakeholders

Embracing Change

- Effective change control strategies
- Evaluating CRs for value
- Qualifying CRs with an Opportunity Register
- Evaluating CRs with an Opportunity Screen
- Selecting high value changes

Learning Approach
- A highly experienced instructor will use interactive lecture format, numerous hands-on exercises, team activities, group discussions, and other techniques to drive home the essential points of this material
- We will build on your prior experience in this topic, while providing you with a structure and vocabulary to use in future projects.

- If you have modest project management knowledge, you will find that the clarity of the material and direct presentation style of the instructor will make the subject matter easy to understand.
- You will receive a Student Guide which will help you follow the material, take notes and retain what you learned so that you can apply it on your job.

Why Should I Take This Course?

- Experienced project managers will obtain tools and insights that lend structure and perspective to the wealth of experience they already have.
- All participants take home a set of tools and techniques to help them deal with critical aspects of change control, including a list of change control Best Practices and a set of commercial quality templates.
- Take this course and learn how to avoid many of the problems that project managers most often encounter when dealing with change.