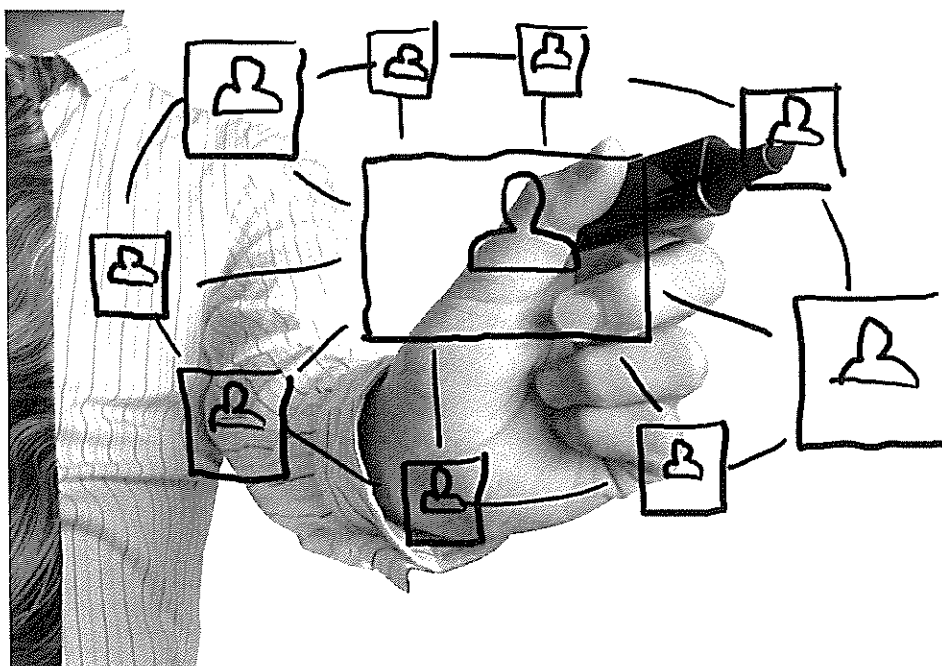


**SUCCESSION  
TRAINING**

## **BSB51415 Diploma of Project Management**



## **Integration Management**

**Version 1.01 Produced 18 October 2018**

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|-----------------|-------------------------------------------------------|----------------|
| 5 May 2016      | Version 1.0 produced following assessment validation. | 1.0            |
| 18 October 2018 | Version 1.01 Change to Practical Assessment           | 1.01           |

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## ASSESSMENT WORKBOOK COVERSHEET

|                    |                        |
|--------------------|------------------------|
| WORKBOOK:          | Workbook 5             |
| TITLE:             | Integration Management |
| FIRST AND SURNAME: | Sophie Scott           |
| PHONE:             | 0419 675 102           |
| EMAIL:             | sscott@watpac.com.au   |

Please read the Candidate Declaration below and if you agree to the terms of the declaration sign and date in the space provided.

By submitting this work, I declare that:

- I have been advised of the assessment requirements, have been made aware of my rights and responsibilities as an assessment candidate, and choose to be assessed at this time.
- I am aware that there is a limit to the number of submissions that I can make for each assessment and I am submitting all documents required to complete this Assessment Workbook.
- I have organised and named the files I am submitting according to the instructions provided and I am aware that my assessor will not assess work that cannot be clearly identified and may request the work be resubmitted according to the correct process.
- This work is my own and contains no material written by another person except where due reference is made. I am aware that a false declaration may lead to the withdrawal of a qualification or statement of attainment.
- I am aware that there is a policy of checking the validity of qualifications that I submit as evidence as well as the qualifications/evidence of parties who verify my performance or observable skills. I give my consent to contact these parties for verification purposes.

Name :Sophie Scott

Signature: 

Date:  
18/08/20

## CASE STUDY

### Instructions to Student

---

These case studies are hypothetical situations which will not require you to have access to a workplace, although your past and present workplace experiences may help with the responses you provide. You will be expected to encounter similar situations to these in future as you work in a project team environment.

In the real world you are likely to encounter the situation where you enter a project, taking over from another project manager. The documentation that is handed over to you is not necessarily up to scratch, and there could be serious issues with the project. This assessment captures that real life scenario.

The case studies are the first part of dealing with “multiple complex projects” required in all the units of this subject. The other assessment covering this requirement is the practical assessment. When you have completed the case studies you will be able to commence the practical assessment which covers the generic skills needed to function as an effective project team member. This assessment on the other hand covers the application of the underpinning knowledge and background theory.

## Introduction

---

You have been appointed as a project management consultant advisor to the project team at Awesome Landscapes Pty Ltd. Specifically you are required to provide independent advice on seeing their current project through the entire life cycle.

You have already provided advice to them in the previous four workbooks.

The project manager has advised the project is now complete, and is about to archive all the project documentation.

Your task is to evaluate the supplied project documentation and to ensure all due diligence has been completed.

You will need to compare the project plan with the previous version to ensure it is ready for closure.

**Project Charter version 4 (.pdf)**

**Project Plan version 4 (.pdf)**

**Project Gantt Chart version 4 (.mpp)**

**Project Gantt Chart version 4 (.pdf)**

**Project Network Diagram version 4 (.pdf)**

*(username: cstclearner password: CstcPty@123)*

**Note: These documents were generated in year 2016. For the purpose of this assessment, refer to '2016' as the current year and '2017' as the succeeding year.**

1. Sam has asked to you check the Project Plan for anything that is missing. He has been very busy but appears to have done all the necessary finalisation of the plan ready for sign off.

He has mentioned the final report or lessons learnt documentation has not been included, and the project archiving checklist have not been completed either. You will be assigned to complete these later.

Examine the Project Charter (version 4) and Project Plan (version 4) and identify four (4) things that are missing.

**Guidance:**

- a. Assume the Project Gantt Chart and the financial figures in the summary/detailed costing tables are up to date as these have already been audited. Also remember this final project plan is in draft, and will not be signed off until the final acceptance meeting in a few days' time.
- b. Take note of the following:
  - i. Version control.
  - ii. The updates from the project in the other workbooks you have completed in previous workbooks.
  - iii. Check the project archiving checklist for everything that should be included

- |                                                                                                                                                                                                                |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ol style="list-style-type: none"><li>a. Issues Register</li><li>b. Project Risk Review Matrix</li><li>c. Amended statement of work for the new digging contractor</li><li>d. Quality Audit Template</li></ol> |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

2. Sam is in the process of developing a set of Lessons Learnt Documentation for the project.
  - a. Access and review the four (4) previous workbooks you have completed and derive three (3) different lessons learnt throughout the project.
  - b. Document each lessons learnt using the Lessons Learnt Documentation Template provided. Use one template for each lessons learnt.

### Lessons Learnt Documentation Template 1

|                               |                                          |
|-------------------------------|------------------------------------------|
| Project Name                  | Cascade Peak Chalets Landscaping Project |
| Prepared by                   | Sam Ng                                   |
| Date                          | 19/04/17                                 |
| Project Manager               | Sam Ng                                   |
| Lessons Learnt Number         | 1                                        |
| Lesson Learned Proposed Name: | Scope Creep                              |
| Project Team Role:            | Project Manager                          |

Process Group\*

☐ Initiating ☐ Planning ☒ Executing ☐ Controlling ☐ Closing

Specific project management process being used:  
Managing change request process and updating the project plan

Specific practice, tool or technique being used:  
Change request template

What action was undertaken? A change request form needed to be completed to allow for changes such as extra retaining walls being added

What was the result? Increase in project cost as changes were not budgeted for

What might have been a more preferred result? No impacts to the budget

What might have created the more preferred result? A more thorough project plan that included all buildings

What is the specific lesson learnt?

Before entering the executing phase ensure that the project plan is scoped correctly and all parties agree

How could one identify a similar situation in the future?

In the planning phase ensure all parties agree on the scope and requirements

What behaviour is recommended for the future?

Better communication between the sponsor and stakeholders

Where and how can this knowledge be used later in this current project?

Before moving onto each stage ensure the project plan and scope are up to date and any changes budgeted and planned for

Who should be informed about this Lesson Learnt:

- ☒ Executive(s)    ☒ Project Manager(s)    ☒ Project team (s)    ☐ All staff  
☐ Others

How should this Lesson Learnt be disseminated?

- ☒ E-mail    ☐ Intranet/Web site    ☒ Tip Sheet/FAQ    ☐ Library  
☐ Others

## Lessons Learnt Documentation Template 2

|                               |                                          |
|-------------------------------|------------------------------------------|
| Project Name                  | Cascade Peak Chalets Landscaping Project |
| Prepared by                   | Sam Ng                                   |
| Date                          | 19/04/17                                 |
| Project Manager               | Sam Ng                                   |
| Lessons Learnt Number         | 2                                        |
| Lesson Learned Proposed Name: | Relationships between parties            |
| Project Team Role:            | Project Manager                          |

Process Group\*

- ☐ Initiating    ☐ Planning    ☒ Executing    ☐ Controlling    ☐ Closing

Specific project management process being used:

Cross reference check

Specific practice, tool or technique being used:

Check list

What action was undertaken? Hiring sub contractors

What was the result? Conflict between the new sponsor and sub contractor

What might have been a more preferred result? No conflict within any teams

What might have created the more preferred result? Ensuring thorough background checks are completed on all sub contractors

What is the specific lesson learnt?

The need for strong background checks

How could one identify a similar situation in the future?

Speak to references before engaging contractors

What behaviour is recommended for the future?

Completing reference checks

Where and how can this knowledge be used later in this current project?

Before employing any new sub contractors

Who should be informed about this Lesson Learnt:

☒ Executive(s) ☒ Project Manager(s) ☒ Project team (s) ☐ All staff

☐ Others

How should this Lesson Learnt be disseminated?

☒ E-mail ☐ Intranet/Web site ☒ Tip Sheet/FAQ ☐ Library

☐ Others

### Lessons Learnt Documentation Template 3

|                               |                                          |
|-------------------------------|------------------------------------------|
| Project Name                  | Cascade Peak Chalets Landscaping Project |
| Prepared by                   | Sam Ng                                   |
| Date                          | 19/04/17                                 |
| Project Manager               | Sam Ng                                   |
| Lessons Learnt Number         | 3                                        |
| Lesson Learned Proposed Name: | Managing Budgets                         |

Project Team Role: Project Manager

Process Group\*  
☐ Initiating ☐ Planning ☒ Executing ☐ Controlling ☐ Closing

Specific project management process being used:  
Budgeting

Specific practice, tool or technique being used:  
Estimating project costs

What action was undertaken? A project budget was created  
What was the result? It did not factor in all necessary costs so the project came in above budget  
What might have been a more preferred result? Project coming in under budget  
What might have created the more preferred result? Doing a more extensive estimation of the budget

What is the specific lesson learnt?  
Budgeting is very important to a project

How could one identify a similar situation in the future?  
If in the early stages of planning no one is creating an extensive budget

What behaviour is recommended for the future?  
More extensive and inclusive budgeting

Where and how can this knowledge be used later in this current project?  
Before each stage of the project ensure all costs have been considered and changes made where appropriate

Who should be informed about this Lesson Learnt:  
☒ Executive(s) ☒ Project Manager(s) ☐ Project team (s) ☐ All staff  
☐ Others

How should this Lesson Learnt be disseminated?  
☒ E-mail ☐ Intranet/Web site ☒ Tip Sheet/FAQ ☐ Library  
☐ Others

3. Sam has asked you to write the final report for the project. Complete the final report using the template below, assuming the things missing from the project plan in the question above have been included.

**Guidance:**

- a. Access and carefully review the project documentation you were provided with along with the case study scenario and populate all the fields with the required information.
- b. Provide a date that is later than the last date in the Project Gantt Chart version 4.
- c. Assume that this report will be submitted to Terrence Mackay, Stephen Lyons, Kate Chan, and Kim Nguyen.
- d. Provide a brief summary of the project in terms of the four project constraints (Scope, Cost, Time, and Quality).
- e. Provide a detailed summary of the project covering the functions of project management listed below. Further guidance is provided for you within the template.

Project Name: Cascade Peak Chalets Landscaping Project

Prepared by: Sophie Scott

Date: 19/04/17

#### Project Summary

Scope (What was included and excluded)

#### Inclusions:

##### Stage 1 – Pre-building

- Removal of vegetation in areas being cleared and replanting/maintaining the plants for replanting in stage 3.
- Supply and delivery of all vegetation removal equipment and tools.
- Supply and erection of covered building to store and grow native plants collected from areas being cleared.
- Irrigation, potting and chemicals for maintenance of plants.
- Separation and disposal of weeds from native plants.
- Ensuring the ongoing health of large plants and trees left in the ground.
- Access roads through the existing forest for builders to access each building site.
- Supply and delivery of all excavation equipment and vehicles.
- Removal of soil and storage in designated location on site for use for landscaping.
- Supply and laying of road gravel along temporary access roads.
- Building an unsealed car park at the front entrance.
- Retaining walls to provide stability around the buildings.
- Supply and delivery of granite boulders and all other raw materials used for retaining walls.
- Construction of retaining walls.
- Insertion of soil into retaining wall areas from excavations.
- Compacting of soil behind retaining walls as required for foundation work.

##### Stage 2 - Building Support

- Monitoring the building site for erosion, subsidence or other environmental issues.
- Managing any erosion or subsidence in the land where chalets are being built.
- Maintaining the road access to the chalets.
- Monitoring trees and other vegetation not removed.
- Excavation for incoming utilities (electric cable, water supply, etc.).
- Digging channels as per plans and installer requirements.
- Filling in and compacting channels once utilities installed.
- Ensuring surface infrastructure for utilities remain clear and uncovered.
- Excavation of sewerage and septic system.
- Excavation of holes for septic tanks.
- Excavation of channels for sewerage pipes.
- Filling in and compacting channels and holes once sewerage and septic system has been installed.
- Ensuring surface infrastructure for sewerage and septic systems remain clear and uncovered.
- Maintaining the plants removed in stage 1.
- Supply of all chemicals and equipment needed to maintain the plants.
- All maintenance of the green houses.
- Maintenance of all plants.
- Removing weeds and pests as required.
- Repair of slip damage.

##### Stage 3 - Planting and Landscaping

- Diversion of stream and creation of water channels through resort in between the chalets.
- Construction of stream channels as per plan.

- Supply and delivery of granite boulders for landscaping and ground stability around the stream channels.
- Excavation of channels diverting water from main stream.
- Construction of weir system used to divert water.
- Construction of drainage system to return water to main stream downstream from chalets.
- Testing and troubleshooting.
- Conversion of most access roads into landscaped walking paths.
- Expansion of car park along main road.
- Removal of access road gravel and laying over car park.
- Sealing of car park over gravel.
- Restoration of soil around old access roads.
- Construction of stone paved walking paths between chalets as per plan.
- Compacting and ensuring no erosion or subsidence risk.
- Erection of signage around resort.
- Erecting signs provided by marketing project.
- Concreting and additional landscaping around signs.
- Detailed landscaping around chalets and paths.
- Soil surface preparation.
- Additional boulders placed in landscaping.
- Removal of all weeds in resort.
- Planting of native plants removed in stage 1 plus additional native plants back into landscaped areas to blend in with forest.
- Planting of all healthy native plants removed in stage 1.
- Purchasing and delivery of additional native plants to fill the gaps.
- Planting additional plants.

## Exclusions

### Stage 1 – Pre-building

- Removal of vegetation in areas being cleared and replanting/maintaining the plants for replanting in stage 3.
- Sourcing and maintenance of any additional native plants to be planted at the end of the project.
- Removal of trees (these will remain in the ground, and buildings will be erected around them).
- Planting of new trees.
- Access roads through the existing forest for builders to access each building site.
- Sealing of roads or car park.
- Maintenance of main road up the mountain to the resort property.
- Construction of any foot paths.
- Construction of any bridges, culverts.
- Construction of any electrical services (e.g. street lighting, power access to chalet sites, etc.).
- Retaining walls to provide stability around the buildings.
- Construction of foundations.
- Planting around retaining walls.

### Stage 2 – Building Support

- Monitoring the building site for erosion, subsidence or other environmental issues.
- Monitoring and maintaining partially and fully constructed buildings.
- Monitoring and maintaining the main road.
- Creation of additional retaining walls.
- Onsite security (this is provided by the chalet development project).
- Any building, decorating or furnishing of the chalets.
- Excavation for incoming utilities (electric cable, water supply, etc.).
- Installation of utilities.
- Installation of service points at either road or chalet end.
- Provision or delivery of utility raw materials or installation equipment.
- Testing of the utilities (this will be done by the building contractors when the cables and pipes have been laid, but before they are buried.
- Weather damage.
- Excavation of sewerage and septic system.
- Installation of pipes and tanks.
- Construction of septic system buildings or other infrastructure.
- Provision or delivery of pipes and tanks.
- Maintaining the plants removed in stage 1.
- Purchase and maintenance of additional native plants to replace any that had perished.
- Removal of additional plants or weeds from the building sites.

### Stage 3 - Planting and Landscaping

- Diversion of stream and creation of water channels through resort in between the chalets.
- Nil
- Conversion of most access roads into landscaped walking paths.
- Construction of any roads within the resort.

- Construction of any hand rails (this will be done by builders in the chalet development project once we have finished developing the paths.
- Erection of signage around resort.
- Sign design or sign writing.
- Detailed landscaping around chalets and paths.
- Any pot plants to go around or inside chalets.
- Development of any ongoing maintenance plan.
- Planting of native plants removed in stage 1 plus additional native plants back into landscaped areas to blend in with forest.
- Purchase, delivery of planting of any exotic species.
- Development of any plant maintenance plan.

Cost (Budget vs. actual)

Budget - \$514,892.00

Actual - \$

Time (Estimate vs. Actual)

Estimate - Project commences 03 August 2016 to finish 11 March 2017

Actual - Project commenced 27 July 2016 to 13 April 17

| Project Report Submitted to: |                                                             |                |
|------------------------------|-------------------------------------------------------------|----------------|
| Name: Terrence Mackay        | Title: General Manager<br>Cascade Peak Hotel Pty<br>Ltd     | Date: 19/04/17 |
| Name: Stephen Lyons          | Title: Planning Manager -<br>Cascade Peak Shire<br>Council  | Date: 19/04/17 |
| Name: Kate Chan              | Title: Project Manager -<br>Timber Home<br>Construction Ltd | Date: 19/04/17 |
| Name: Kim Nguyen             | Title: Director – Awesome<br>Landscapes Pty Ltd             | Date: 19/04/17 |

#### Analysis of Project

Guidance:

- a. *Process Review* - Describe all of the processes used during the planning, implementation and closure stages.
- b. *Lessons Learnt* - Describe what went right and or what went wrong and how effective were the management and the processes you used. If necessary, state how you overcame any problems.
- c. *Recommendations* – Make recommendations as a result of the lessons learned.

#### Scope

Process Review

The Project Charter document was used in the scoping stage

#### Lessons Learnt

To make sure all stakeholders are on the same page and there are no changes/additions to the scope

#### Recommendations

For all parties to be able to work together therefore learning how to communicate well

### Time

#### Process Review

The Gantt Chart was used to track time of all tasks

#### Lessons Learnt

Ensure all tasks are calculated at the beginning of the project avoid any delays

#### Recommendations

Sure that all parties have the same goal in regards to timing

### Cost

#### Process Review

Project Cashflow, Costing per Phase, Detailed Costing per Task documents were used to track all costs

#### Lessons Learnt

Ensure there is enough money to cover each phase

#### Recommendations

If required request change of payments sooner

### Quality

#### Process Review

Quality management plan, quality analysis tool, quality plan, quality audit documents were in place.

#### Lessons Learnt

Ensure Quality Audits are completed regularly

#### Recommendations

Ensure all processes are audited monthly

### Human Resources

#### Process Review

Staffing management plan and an issues register were in place

#### Lessons Learnt

When issues arise ensure the issues register is completed and given to the correct management

#### Recommendations

Keep the teams moral high and ensure that all team member understand their roles and they feel comfortable with speaking to management if they need help

### Communications

#### Process Review

Organisation Charts, Communications Plan and Responsibility Assignment Matrix.

#### Lessons Learnt

Ensure all parties which include the sponsor, stakeholders and the builder use the document that are available to them

## Recommendations

Ensure to update all documents necessary if there has been a change

## Procurement

### Process Review

Procurement Management Planning Checklist

### Lessons Learnt

Ensure the procurement checklist and thorough checks are completed with each sub-contractor that is hired

### Recommendations

Make sure to carry out all reference and licence checks

## Risk

### Process Review

Risk Rating Table, Risk Brainstorming Worksheet, Project Risk Categorisation Worksheet, Project Risk Prioritisation Worksheet, Risk Response Plan, Project Risk Review Matrix

### Lessons Learnt

Ensure each document above is filled out correctly and accurately

### Recommendations

Ensure that all documents are updated as the risk changes throughout the project

## Project Integration

### Process Review

Project Status Reports

### Lessons Learnt

Ensure that processes and procedures are in place to be able to manage all elements of the project

### Recommendations

To ensure that all parties communicate well to enable the project life cycle to run as smoothly as possible

4. Sam has approved the report in the above question to be distributed. He has also updated the project plan following your advice. Now he is ready for the project closure meeting. He has assigned you the task of organising this meeting.

Answer the questions that follow.

|                                                                                                                                                                                                                                                                                                            |  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| a. Who will attend this meeting?<br>Guidance: List the attendees by name, job title, and organisation).                                                                                                                                                                                                    |  |
| Terrence Mackay - General Manager Cascade Peak Hotel Pty Ltd<br>Stephen Lyons - Planning Manager - Cascade Peak Shire Council<br>Kate Chan - Project Manager - Timber Home Construction Ltd<br>Kim Nguyen - Director – Awesome Landscapes Pty Ltd<br>Sam Ng - Project Manager – Awesome Landscapes Pty Ltd |  |
| b. What information will each person need before the meeting?                                                                                                                                                                                                                                              |  |
| Any outstanding documents that need to be addressed or finalised                                                                                                                                                                                                                                           |  |
| c. Which documents (and which version number of each document) will need to be printed off for the meeting?                                                                                                                                                                                                |  |
| The latest version of the project charter, project plan and project sign off document                                                                                                                                                                                                                      |  |
| d. Which of these documents will require signatures?                                                                                                                                                                                                                                                       |  |
| Project charter, project plan and project sign off document                                                                                                                                                                                                                                                |  |
| e. Who will need to sign off on these documents?                                                                                                                                                                                                                                                           |  |
| The project steering committee                                                                                                                                                                                                                                                                             |  |
| f. Do you believe the project objectives aligned with the objectives of Awesome Landscapes throughout the entire project life cycle? Explain your answer.                                                                                                                                                  |  |
| Yes, both parties both wanted the project to be successful and executed to the highest quality                                                                                                                                                                                                             |  |
| g. What needs to be done after the meeting to complete the closure of the project?                                                                                                                                                                                                                         |  |

The archiving process

## WORKBOOK CHECKLIST

When you have completed this workbook, please ensure you have completed all parts of it:

☒ **Case Study**

### IMPORTANT REMINDER

**Students must achieve a satisfactory result to ALL assessment tasks to be awarded COMPETENT for the unit relevant to this subject.**

To award the student competent in the units relevant to this subject, the student must successfully complete all the requirements listed above according to the prescribed benchmarks.

**End of Document**