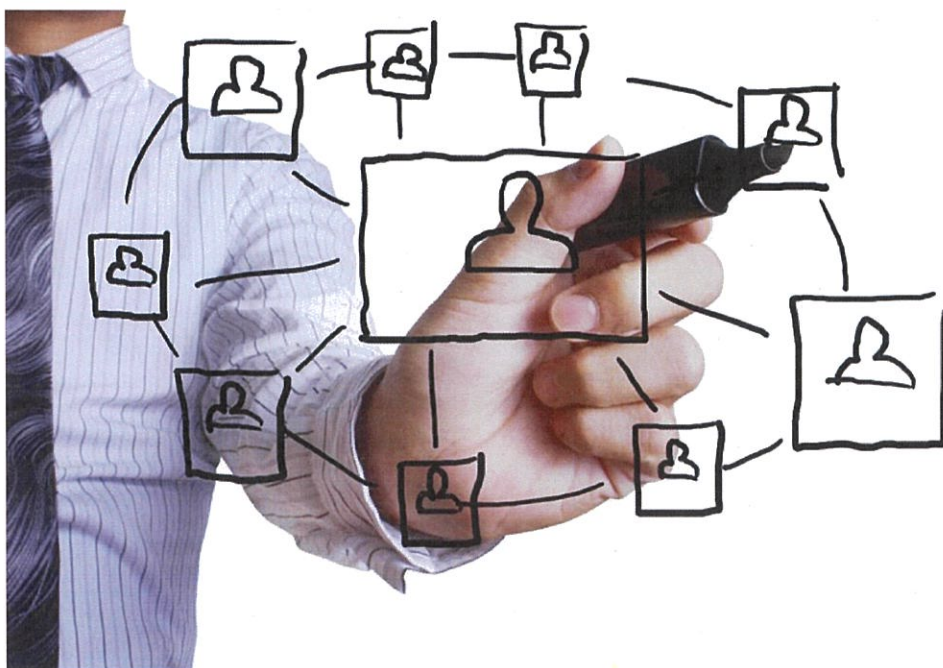




**SUCCESSION
TRAINING**

BSB51415 Diploma of Project Management



Integration Management

Version 1.01 Produced 18 October 2018

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Version control & document history

Date	Summary of modifications made	Version
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:	Benjamin Dickson
PHONE:	0457 560 160
EMAIL:	bdickson@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 : Benjamin Dickson

Signature: 

Date: 19/5/21.

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

- a. Project Plan Distribution List has not been signed off.
- b. Version Control table doesn't indicate this is the final version.
- c. Unable to check the project archiving checklist due to it not having been completed yet.
- d. Issues register has not been completed and signed off

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	14/04/2017
Project Manager	Sam Ng
Lessons Learnt Number	01
Lesson Learned Proposed Name:	Client Change
Project Team Role:	Project Manager, Client

Process Group*

☐ Initiating
 ☐ Planning
 ☒ Executing
 ☐ Controlling
 ☐ Closing

Specific project management process being used:

Handover Report, contractual changes, meetings

Specific practice, tool or technique being used:

Communication and document control

What action was undertaken?	New client was found and took control of the project. Additional cost of replacement plants lost during project closure
What was the result?	Positive outcome
What might have been a more preferred result?	Original client maintained control of the project. Nil additional costs.
What might have created the more preferred result?	Original planning and scope and cost establishments prior to progression of the project.

What is the specific lesson learnt?	
Ensure due diligence is performed in early stages of the commital process of the project. This has the potential to prevent project delays.	
How could one identify a similar situation in the future?	
Ensure administrative checks are thorough.	
What behaviour is recommended for the future?	
Not necessarily required	
Where and how can this knowledge be used later in this current project?	
N/A	
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	14/04/2017
Project Manager	Sam Ng
Lessons Learnt Number	02
Lesson Learned Proposed Name:	Change of staff and contractors
Project Team Role:	Project Manager, Site Manager
Process Group*	
☒ Initiating	☐ Planning
☒ Executing	☒ Controlling
☐ Closing	
Specific project management process being used:	
Procurement of staff, maintaining staff	

Specific practice, tool or technique being used:			
HR resources, communication, team building.			
What action was undertaken?	New excavation contractor was procured. Two new landscapers employed.		
What was the result?	Minor down time, which increased the requirement to get back on programme, additional costs for Awesome Landscape.		
What might have been a more preferred result?	Excavation contractor remained on project. Landscapers did not resign and remained on project for the duration of the project.		
What might have created the more preferred result?	More indepth review process of the excavation contractor prior to the engagement. More indepth review process at employee engagement to ensure that employees remained for the duration of the project. Ensure team happiness is maintained throughout the duration of the project.		
What is the specific lesson learnt?			
Ensure due diligence is performed within the procurement process for all subcontractors Ensure contentment of all staff, ensure a thorough recruitment process is performed prior to employee engagement.			
How could one identify a similar situation in the future?			
Monitor behaviour of subcontractors and employees. Complete in depth background checks.			
What behaviour is recommended for the future?			
Proactive behaviour is required. Observance.			
Where and how can this knowledge be used later in this current project?			
Throughout the duration of the project and till completion			
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	14/04/2017
Project Manager	Sam Ng
Lessons Learnt Number	03
Lesson Learned Proposed Name:	Weather events
Project Team Role:	Project Site Team

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

Specific project management process being used:
Site Management

Specific practice, tool or technique being used:
Observations and proactive management at a Site level

What action was undertaken?	Rectification of damaged works.
What was the result?	Additional costs and extension of time.
What might have been a more preferred result?	Nil weather events which resulted in damage.
What might have created the more preferred result?	More effective erosion controls.

What is the specific lesson learnt?
Ensure environmental controls have been assessed and over engineered.

How could one identify a similar situation in the future?
Monitoring of weather.

What behaviour is recommended for the future?
Proactive. Ensure environmental controls have been assessed and over engineered.

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

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:

- 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.
- Provide a date that is later than the last date in the Project Gantt Chart version 4.
- Assume that this report will be submitted to Terrence Mackay, Stephen Lyons, Kate Chan, and Kim Nguyen.
- Provide a brief summary of the project in terms of the four project constraints (Scope, Cost, Time, and Quality).
- 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:	Ben Dickson	
Date:	14/04/2017	
Project Summary		
Scope (What was included and excluded)		
Inclusions: The project inclusions for each deliverable include: Stage 1-Pre Building (pg 17 Version 4 Project Plan) Stage 2-Building Support inclusive of repairing of slip damage(pg18 Version 4 Project Plan) Stage 3-Planting and Landscaping (pg18-pg19 Version 4 Project Plan)		
Exclusions The project exclusions for each deliverable include: Stage 1-Pre Building (pg 19 Version 4 Project Plan) Stage 2-Building Support (pg 20 Version 4 Project Plan) Stage 3-Planting and Landscaping (pg 20-21 Version 4 Project Plan)		
Cost (Budget vs. actual)		
\$444,253 vs \$514,892. Budget increased with additional expenses as the project progressed.		
Time (Estimate vs. Actual)		
Completion of works initially was to be completed within 9 months. Actual build time was 12 months		
Project Report Submitted to:		
Name: Terrence Mackay	Title: General Manager-Cascade Peak Hotel	Date: 15/04/2017
Name: Stephen Lyons	Title: Planning Manager-Cascade Peaks Shire Council	Date: 15/04/2017
Name: Kate Chan	Title: Project Manager-Timber Home Construction Ltd	Date: 15/04/2017
Name: Kim Nguyen	Title: Director-Awesome Landscapes	Date: 15/04/2017

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

A scope management plan was developed prior to the commencement of the project. it was broken down into 3 critical phases titled Stage 1 Pre-Building, Stage 2-Building Support and Stage 3-Planting and Landscaping. Within each of the 3 stages there were inclusions and exclusions implemented for each Stage to ensure ensure clarity of what was required to be completed and produced. As changes were made or required updates were made to reflect such changes i.e 3 additional retaining walls required and the repair of slip damage.

Lessons Learnt

Ensure that the Scope management plan is updated as required to ensure all involved have clarity of what the objectives are for the project. This ensures everyone is on the "same page".

Recommendations

Ensure clear communication has been established with all relevant parties involved. This ensures expectations and deliverables are communicated well therefore achieved as required.

Time

Process Review

Commencement of the project was due 3 August 2016 and was brought forward to 27th July 2016. As a result completion date was adjusted to 12 April 2017. This was due to numerous factors such as additional works, adverse weather affects and change of client ownership.

Lessons Learnt

Time management is an essential aspect of any project.

Recommendations

All aspects of the project management team must ensure a programme is strictly adhered to. If delays do occur they are to ensure it is minimialised to so it has minimal impact.

Cost

Process Review

Original budget allocated was \$444,253 which then extended to \$514,892.

Lessons Learnt

Increased time equals increased costs.

Recommendations

Budget must be set and adhered to. It is evident that increasing the length or time of the project increases the cost of the project.

Quality
Process Review Project was audited on a regular basis throughout the duration of the project. These were conducted by the Project Manager and the Shire Council. Lessons Learnt By utilising a regular and thorough auditing process this can ensure quality standard is maintained. Recommendations All projects should set a auditing regime prior to the commencement of a project and ensure it is completed as per timeframe.
Human Resources
Process Review For the majority of the project the project team showed cohesiveness. Supervision of the project team was aligned with Awesome Landscapings objectives. Lessons Learnt Throughout the project two team members vacated the project. This had the potential to cause major issue. This was mitigated by an effective recruitment process implemented by Awesome Landscaping HR department. Recommendations Review Awesome Landscapes recruitment process to ensure it remains effective for the allocation of labour for future projects.
Communications
Process Review Formal reporting processes and communications on the project were deemed effective. Lessons Learnt Communication is essential in all aspects of project management. Recommendations Awsome Landscape could recommend a course which could be undertaken by all Awsome Landscape staff to ensure communications conduits remain effective.
Procurement
Process Review Initial tendering process was effective. Selection of contractors proved viable except for the excavation contractor. Management of of contractors was effective. Lessons Learnt Ensure a detailed review process is condcuted on all potential candidates. Recommendations Ensure a secondary backup subcontractor is easily accessible to ensure continuity of works on a project.
Risk
Process Review Risk management was well conducted on this project. Lessons Learnt Risk management is an integral process of project management.

Recommendations

Project team to conduct a Risk Management course.

Project Integration

Process Review

Requirements of the sponsor were well communicated in the majority of circumstances except in the case of the additional retaining walls.

Lessons Learnt

Ensure the sponsors requirements are well communicated and documented to ensure an effective drama free build.

Recommendations

Regular contact, meetings etc are to be with the sponsor to ensure requirements and expectations are met.

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?

Guidance: List the attendees by name, job title, and organisation).

Terrence Mackay, General Manager -Cascade Peak Hotel Pty Ltd. Stephen Lyons, Planning Manager -Cascade Peak Shire Council. Kate Chan, Project Manager -Timber Home Construction Ltd. Kim Nguyen, Director -Awesome Landscapes Pty Ltd. Sam Ng, Project Manager -Awesome Landscapes Pty Ltd.	
b.	What information will each person need before the meeting?
Project Completion Report, Final version of the project plan, Project Archives checklist, Formal acceptance and closure.	
c.	Which documents (and which version number of each document) will need to be printed off for the meeting?
Project Completion Report Version 1 Final Version of the Project Plan Version 4 Project archives checklist Version 1 Formal acceptance and closure documentation Version 1	
d.	Which of these documents will require signatures?
Completion report, project plan, project charter and formal acceptance and closure.	
e.	Who will need to sign off on these documents?
Terrence Mackay (Cascade Peak Hotel), Kim Nguyen (Awesome Landscapes) and Stephen Lyons (Cascade Peak Shire Council)	
f.	Do you believe the project objectives aligned with the objectives of Awesome Landscapes throughout the entire project life cycle? Explain your answer.
I believe Awesome Landscapes aligned with the project objectives. The 6 main objectives which are outlined on page 6 of the Project Plan have all been achieved and completed.	
g.	What needs to be done after the meeting to complete the closure of the project?
Each steering committee member takes their copy of the project completion documentation for their own archiving. Awesome Landscaping may raise an invoice for final contract payment. Also as per 2.4 Handover pg 21 Version 4 of the Project Plan.	

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