



**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:	Haydon Hall
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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 : Haydon Hall

Signature: H.Hall

Date: 10.04.21

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. Risk Review not updated
- b. Risk register not updated
- c. Statement of work for new digging contractor not completed
- d. Reference to J.P Digging still evident throughout project plan.
- e. budgets and cashflow documents not updated

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 Peaks Chalets Landscaping Project
Prepared by	Haydon Hall
Date	16/04/2017
Project Manager	Sam Ng
Lessons Learnt Number	01
Lesson Learned Proposed Name:	Alteration in scope
Project Team Role:	Manage and minimise project outcomes and deliverables
Process Group*	
Initiating	Planning
Executing	Controlling
Closing	
Specific project management process being used:	
Organising	
Specific practice, tool or technique being used:	
Change in procedures	
What action was undertaken?	During the early stages of the project, there was a change in scope to allow for the construction of the additional chalets. Awesome Landscapes identified the additional work required outside of their original scope.

What was the result?	Change request was introduced, which resulted in a change in budget and timeframe.		
What might have been a more preferred result?	As this was in the early stages of the project, it would have been ideal if the additional scope was included at the start of the project, with increased funding included.		
What might have created the more preferred result?	Any potential variations to the cope be highlighted at early stages with potential costs included into the original scope		
What is the specific lesson learnt?			
Increased scope to have clear idenitification that it will incur extra costs			
How could one identify a similar situation in the future?			
Have varioation rates included into the scope			
What behaviour is recommended for the future?			
Any potential extra scope to be identified at the tender process and be included into the original scope.			
Where and how can this knowledge be used later in this current project?			
Any extra activities being requested by the project sponsor in the future.			
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 Chalet Landscaping Project								
Prepared by	Haydon Hall								
Date	16/04/2017								
Project Manager	Sam Ng								
Lessons Learnt Number	02								
Lesson Learned Proposed Name:	Importance of high morale and staff relationships								
Project Team Role:	Manage and minimise project outcomes and deliverables								
Process Group*									
	Initiating		Planning		Executing		Controlling		Closing
Specific project management process being used:									
Human Resource management									
Specific practice, tool or technique being used:									
Staff relations, Face to Face meetings									
What action was undertaken?	Long term staff left the company due to the incapacity to provide long term and stable employment								
What was the result?	New staff were to be hired on short notice in order to complete the project								
What might have been a more preferred result?	Long term, senior staff to stay with the company.								
What might have created the more preferred result?	Staff given the option to work on another project within the company or furthermore, go on leave until the project sponsor issue was rectified.								
What is the specific lesson learnt?									

Although the staff are long term, they can leave at anytime.				
How could one identify a similar situation in the future?				
Ensure all staff are happy in their current position and their morale is high.				
What behaviour is recommended for the future?				
Higher levels of communication with staff, in particular, long term staff members.				
Where and how can this knowledge be used later in this current project?				
Any further stoppages throughout the 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	Face to face meeting			

Lessons Learnt Documentation Template 3

Project Name	Cascade Peak Chalets Landscape Project
Prepared by	Haydon Hall
Date	16/04/2017
Project Manager	Sam Ng
Lessons Learnt Number	03
Lesson Learned Proposed Name:	Deficits in the QA and recording proess
Project Team Role:	Manage and minimise project outcomes and deliverables

Process Group*	
Initiating	Planning
Executing	Controlling
Closing	
Specific project management process being used:	
Record Keeping, QA, QC	
Specific practice, tool or technique being used:	
Project Charter, Project Plan, Gantt Chart, Quality Audits	
What action was undertaken?	Changes in project documentation had been recorded and updated poorly.
What was the result?	Throughout the project, the schedule and budget have been confusing due to the poor updating of the project documentation.
What might have been a more preferred result?	The project to run smoothly whilst meeting schedule and on budget.
What might have created the more preferred result?	Regular updates of all new information in the project plan and updating correctly.
What is the specific lesson learnt?	
Project documentation updating and recording needs to improve.	
How could one identify a similar situation in the future?	
Regular audits of all project documentation to be completed at regular intervals.	
What behaviour is recommended for the future?	
Audits of all project documentation to be completed monthly by project manager.	
Where and how can this knowledge be used later in this current project?	
To ensure that all documentation stays up to date for the remainder of the 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 Peaks Chalets Landscaping Project
Prepared by:	Haydon Hall
Date:	16.4.2017
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.
- o Supply and delivery of all vegetation removal equipment and tools.
- o Supply and erection of covered building to store and grow native plants collected from areas being cleared.
- o Irrigation, potting and chemicals for maintenance of plants.
- o Separation and disposal of weeds from native plants.
- o 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.
- o Supply and delivery of all excavation equipment and vehicles.
- o Removal of soil and storage in designated location on site for use for landscaping.
- o Supply and laying of road gravel along temporary access roads.
- o Building an unsealed car park at the front entrance.
- Retaining walls to provide stability around the buildings.
- o Supply and delivery of granite boulders and all other raw materials used for retaining walls.
- o Construction of retaining walls.
- o Insertion of soil into retaining wall areas from excavations.
- o 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.
- o Managing any erosion or subsidence in the land where chalets are being built.
- o Maintaining the road access to the chalets.
- o Monitoring trees and other vegetation not removed.
- Excavation for incoming utilities (electric cable, water supply, etc.).
- o Digging channels as per plans and installer requirements.
- o Filling in and compacting channels once utilities installed.
- o Ensuring surface infrastructure for utilities remain clear and uncovered.
- Excavation of sewerage and septic system.
- o Excavation of holes for septic tanks.
- o Excavation of channels for sewerage pipes.
- o Filling in and compacting channels and holes once sewerage and septic system has been installed.
- o Ensuring surface infrastructure for sewerage and septic systems remain clear and uncovered.
- Maintaining the plants removed in stage 1.
- o Supply of all chemicals and equipment needed to maintain the plants.
- o All maintenance of the green houses.
- o Maintenance of all plants.
- o Removing weeds and pests as required.

Exclusions

Stage 1 – Pre-building

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

Stage 2 – Building Support

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

Stage 3 – Planting and Landscaping

Cost (Budget vs. actual)		
\$444 253 vs. \$514 892		
Time (Estimate vs. Actual)		
9 months now 12 months.		
Project Report Submitted to:		
Name: Kate Chan	Title: Project manager - Timber home constructions	Date: 16/4/2017
Name: Kim Nguyen	Title: Director - Awesome Landscapes	Date: 16/4/2017
Name: Terrence Mackay	Title: General Manager - Cascade Peak Hotel	Date: 16/4/2017
Name: Stephen Lyons	Title: Planning manager - Cascade Peak shire council	Date: 16/4/2017
Analysis of Project		
Guidance:		
a. <i>Process Review</i> - Describe all of the processes used during the planning, implementation and closure stages. b. <i>Lessons Learnt</i> - 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. <i>Recommendations</i> – Make recommendations as a result of the lessons learned.		
Scope		
Process Review - increased scope with the construction of 3 additional retaining walls - increased scope in phase 2 to rectify the damaged stormwater due to project being abandoned. - Extra plants to be planted due to the loss of plants throughout the project closure.		
Lessons Learnt - maintain plants during transition of ownership - extra time for delivery personnel		

Recommendations contingency of personnel and money to be built into future projects to maintain the project should there be a change in ownership
Time
Process Review delay in project duration due to change in project sponsor. delay in delivery of materials to site
Lessons Learnt extra time required to be allowed for delivery personnel
Recommendations extra time to be allowed in project plan for deliveries to remote sites.
Cost
Process Review initial estimated cost of the project was \$444 253 and final project cost was \$514 892 additional 100000 in the budget for ownership change
Lessons Learnt shortfall in cashflow at start of project due to payment structure
Recommendations payment schedule to be revised and implemented for better cashflow on future projects
Quality
Process Review QA audits were not reflected in the project plan. Assumptions to be made that QA was sufficient
Lessons Learnt QA inspections and onsite audits did not appear in any versions of the project plan, which means no information (good or bad) was reported to the project team in regards to QA
Recommendations Inspections / QA audits and reporting should be done at all phases of the project to assist with the planning and success of future projects
Human Resources
Process Review Long term landscapers leaving the project.

Lessons Learnt Additional landscapers had to be hired. New landscapers could not have worked out.
Recommendations Ensure there are other projects for the landscapers to work on. If not, ensure landscapers are treated correctly through the shut down period.
Communications
Process Review No progress reports included in the project plan. Each stage of the project could not be evaluated. Final report would not be accurate due to no progress reports completed
Lessons Learnt Performance and communication documentation to be included in project plan and reviewed progressively throughout the project
Recommendations monthly reporting to be completed of all required areas of the project.
Procurement
Process Review change in digging contractor at the request of the new project sponsor.
Lessons Learnt Although this was a rushed process, using unknown contractors could pose large risks on the project.
Recommendations Have relationships/contacts/accounts for backup sub-contractors should they be required
Risk
Process Review major project sponsor change
Lessons Learnt stakeholder and staff changes were not considered in the risk management or project plan hence this caused delay in HR documentd and recruitment
Recommendations Strategy plan in place in the event of a change in project sponsor.
Project Integration

Process Review

Change in project sponsorship. Thankfully there was no large impacts on the project.

Lessons Learnt

The Project plan was written with a high level of detail. This meant the focus could be on completion of project rather than large alterations in the project plan.

Recommendations

progressive project reporting to be completed in case of major stakeholder changes

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).

Terence Mackay – General Manager, Cascade Peak Hotel Stephen Lyons – Planning Manager, Cascade Peak Shire Council Kate Chan – Project Manager, Timber Home Construction Ltd Kim Nguyen – Director, Awesome Landscapes Sam Ng – Project Manager, Awesome Landscapes
b. What information will each person need before the meeting?
- location, date and time of meeting - items to be brought to the meeting i.e - pens, notebook, diary - all documents need to be in draft format ready for sign off
c. Which documents (and which version number of each document) will need to be printed off for the meeting?
Project completion report - rev 1 Project Plan - Version 4 Project Archives Checklist Formal acceptance and closure
d. Which of these documents will require signatures?
The completion report, project plan and formal acceptance and closure must all be signed off.
e. Who will need to sign off on these documents?
Must be signed off by the signatories of 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.
I believe the final project objectives aligned with the objectives of Awesome Landscapes. The key objectives outlined in the Awesome landscapes project plan were followed throughout the project life cycle.
g. What needs to be done after the meeting to complete the closure of the project?
Following the delivery of the final project documentation, Awesome Landscapes may raise an invoice to Cascade Peak Hotel for the final contract payment. Upon the final contract payment, all project documentation may be archived. Electronic and paper copy

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