



**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:	Christine Marcek
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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 :Christine Marcek

Signature:



Date: 9/3/21

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

- | |
|---|
| <ol style="list-style-type: none">a. Project Charter has not been updated with relevant changes as outlined in CR3b. Version Control table does not identify (draft) plan is the final version being prepared for sign offc. Appendix 40 - Work Results Guidelines has not been completed as per section 9.3 Contract Close-outd. Earthmoving contractor name has not been updated in section 6.1 Stakeholders, Appendix 32 Statement of Work etc. |
|---|

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	Christine Marck
Date	17 April 2017
Project Manager	Sam Ng
Lessons Learnt Number	2
Lesson Learned Proposed Name:	Material Cost
Project Team Role:	Procurement
Process Group*	
☐ Initiating ☒ Planning ☐ Executing ☐ Controlling ☐ Closing	
Specific project management process being used:	
Procurement Planning	
Specific practice, tool or technique being used:	
Obtaining Quotes	
What action was undertaken?	Contracts awarded based on previous working history
What was the result?	Variance in cost of materials (road gravel)
What might have been a more preferred result?	Nil increase to material cost
What might have created the more preferred result?	Cost estimation, multiple quotes
What is the specific lesson learnt?	
Increase in material cost	

How could one identify a similar situation in the future?			
Review material costs and cost increases over time			
What behaviour is recommended for the future?			
Obtain multiple quotes prior to awarding subcontracts			
Where and how can this knowledge be used later in this current project?			
NA - project complete			
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
☒	Others	☐	Tip Sheet/FAQ
		☐	Library
Management System - Procurement Procedure Update			

Lessons Learnt Documentation Template 2	
Project Name	Cascade Peak Chalets Landscaping Project
Prepared by	Christine Marck
Date	17 April 2017
Project Manager	Sam Ng
Lessons Learnt Number	3
Lesson Learned Proposed Name:	Skills and Competencies
Project Team Role:	Human Resources
Process Group*	
☐	Initiating
☒	Planning
☐	Executing
☐	Controlling
☐	Closing
Specific project management process being used:	
Develop Project Team	
Specific practice, tool or technique being used:	
Skills Analysis Matrix	

What action was undertaken?	Identification of skill deficiency
What was the result?	Training scheduled to rectify
What might have been a more preferred result?	No skill gaps in staff members
What might have created the more preferred result?	Skill gap identified in advance of project commencement
What is the specific lesson learnt?	
Skills of employees need to be continually assessed with evolving work practices	
How could one identify a similar situation in the future?	
Development of Skills Matrix	
What behaviour is recommended for the future?	
Develop Skills Matrix, ensure updated yearly	
Where and how can this knowledge be used later in this current project?	
NA - project complete	
Who should be informed about this Lesson Learnt:	
☒ Executive(s)	☒ Project Manager(s)
☐ Others	☐ Project team (s) ☐ All staff
How should this Lesson Learnt be disseminated?	
☒ E-mail	☒ Intranet/Web site
☒ Others	☐ Tip Sheet/FAQ ☐ Library
Management System - HR Procedure Update	

Lessons Learnt Documentation Template 3

Project Name	Cascade Peak Chalets Landscaping Project
Prepared by	Christine Marck
Date	17 April 2017
Project Manager	Sam Ng
Lessons Learnt Number	4
Lesson Learned Proposed Name:	Project Delay Impacts
Project Team Role:	Project Management
Process Group*	

☐	Initiating	☐	Planning	☒	Executing	☐	Controlling	☐	Closing	
Specific project management process being used:										
Integration										
Specific practice, tool or technique being used:										
Change Management										
What action was undertaken?			Project Sponsor change							
What was the result?			Impacts from project delay – physical (site erosion / plants) and cultural (office moral / departed staff)							
What might have been a more preferred result?			Reduced impacts both physical & cultural							
What might have created the more preferred result?			Improved change management implementation							
What is the specific lesson learnt?										
Impact resulting from significant and unexpected project delay										
How could one identify a similar situation in the future?										
NA										
What behaviour is recommended for the future?										
Upon notice of project delay, assess potential duration and likely risks. Consider negotiation for implemetaion of mitigation measures e.g. minimal site maintenance activities of erosion control and plant care would have significantly reduced the remediation costs requiried once delay ceased. Alternatively, selling plants would have recouped some of the cost expenditure.										
Where and how can this knowledge be used later in this current project?										
NA - project complete										
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:	Christine Marcek	
Date:	19 April 2017	
Project Summary		
Scope (What was included and excluded)		
Inclusions: The project will include: Stage 1 Prebuilding. This will involve creating access roads and retaining walls in preparation for the construction of the buildings. Stage 2 Building support. This will involve monitoring and maintaining the access roads and retaining walls whilst the buildings are being constructed, plus the excavation of utility services (water and power supplies, septic system, etc.). This will also involve any erosion control or other environmental issues that occur during the building construction. Stage 3 Planting and Landscaping. Once the buildings have been constructed and whilst they are being interior decorated and furnished. This includes the diversion of a local stream to safely run through the resort. At each stage this project will include the sourcing and delivery of all raw materials and landscaping equipment. It will also involve the liaising with stakeholders (including Council) as needed to ensure relevant standards are being met.		
Exclusions The following will not be included in this project: The milling and delivery of timber for the chalets, or the delivery of other materials used to build the chalets. Sourcing, purchasing or delivery of services (cables, drain pipes, etc.) for the services Awesome will be excavating as part of the project. Any scope not covered in the initial Council approved plans.		
Cost (Budget vs. actual)		
Initial project cost totaled \$444,253, netting a profit of \$105,747. Additional costs were incurred during the project due to additional scope, increased cost of materials and later the project delay due to change in project sponsor. An increase to the budget during project sponsor change offset the additional costs incurred, with total project cost coming in at \$514,892, netting a profit of \$135,108.		
Time (Estimate vs. Actual)		
There was an increase to the project completion time due to the requirement for earlier commencement on 17/07/16 to facilitate delivery of supplies and equipment and the project sponsor change which extended the completion date from 12/03/17 to 12/04/17.		
Project Report Submitted to:		
Name: Terrence Mackay	Title: General Manager	Date: 20 April 2017
Name: Stephen Lyons	Title: Planning Manager	Date: 20 April 2017
Name: Kate Chan	Title: Project Manager	Date: 20 April 2017
Name: Kim Nguyen	Title: Director	Date: 20 April 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	
In line with PMBOK: Collect Requirements, Define Scope, Create WBS, Verify Scope and Control Scope.	
Lessons Learnt	
Consider negotiating within the project contract the ability to increase budget for significant scope amendments to reduce risk of budget exceedance.	
Recommendations	
Scope inclusions and exclusions need to be clearly defined and documented, assessment of budget exceedance risk to be undertaken prior to contract agreement.	
Time	
Process Review	
In line with PMBOK: Develop and Control Schedule, use of WBS & Gantt Chart or equivalent.	
Lessons Learnt	
Open communication with subcontractors to ensure needs are accounted for within project schedule, unexpected impact/delays.	
Recommendations	
Mandatory pre-commencement meeting with subcontractors to review schedule prior to finalising project schedule.	
Cost	
Process Review	
In line with PMBOK: Estimate Costs, Determine Budget, Control Costs.	
Lessons Learnt	
Fixed price contract with no official/agreed avenue to increase budget in the event of scope increases the risk of reduced profit margin / budget exceedance.	
Recommendations	
Review contracts, negotiate clause for budget increase for scope increase, clause for variations etc.	
Quality	
Process Review	
Quality Planning, Assurance and Control via process of Define, Measure, Analyse, Improve, Control.	
Lessons Learnt	
Nil - Quality was to standard.	

Recommendations N/A
Human Resources
Process Review In line with PMBOK: Develop HR Plan and Acquire, Develop and Manage Project Team
Lessons Learnt Analysis of key role capabilities to execute role (e.g. supervisor computer skills).
Recommendations Conduct skills analysis of key roles to identify gaps for rectification e.g. formal / informal training, mentoring etc.
Communications
Process Review Development of Communication Requirements Analysis and Communication Plan.
Lessons Learnt Consolidation of subcontractor requirements e.g. for delivery of supplies and materials.
Recommendations Ensure Communication Plan template specifies requirement for pre-commencement meeting with subcontractors prior to project schedule finalisation.
Procurement
Process Review In line with PMBOK: Plan, Conduct, Administer and Close Procurements.
Lessons Learnt Risk of material cost increases.
Recommendations Ensure thorough estimating and procurement procedures are in place to develop project budget.
Risk
Process Review In line with AS/NZS ISO 31000/2009 Risk Management / per risk management framework: Define, Identify, Analyse, Manage and Review.
Lessons Learnt Risk of landscapers leaving was initially forecast as unlikely however unforeseen project sponsor change resulted in this risk occurring.
Recommendations Ensure robust actions are identified for all risks, regardless of assessed likelihood.
Project Integration
Process Review In line with Integration Management Plan: Record Methodology, Change Control, Performance Reporting, Audit and Dependencies.
Lessons Learnt Ensure change control actions are correctly updated within version controls e.g. all necessary documents updated to reflect relevant changes/updates as they occur.

Recommendations Ensure version control updates reviewed.

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). |
| Terrance 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? |
| Meeting location, time, and duration along with documents to be reviewed. |

c.	Which documents (and which version number of each document) will need to be printed off for the meeting?
	To support sustainability best practice, documents can be reviewed electronically. Documents to be reviewed during the meeting are Project Charter, Project Plan (inc appendix), Final Analysis Report
d.	Which of these documents will require signatures?
	Project Charter, Project Plan inc Appendix e.g. 43 - Formal Acceptance and Closure
e.	Who will need to sign off on these documents?
	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. While the project included construction activities which can often have a detrimental impact to the environment, the project requirements included a heavy focus on environmental protection / native species use. This aligns with Awesome Landscapes Vision Statement. Additionally, the project creates opportunities for future work for Awesome Landscapes.
g.	What needs to be done after the meeting to complete the closure of the project?
	Once the Project Closure Meeting and final payments/delivery tasks have been done, the archiving process is required to be undertaken (complete archiving checklist, project due diligence). Records to be indexed and filed per hardcopy and electronic filing requirements.

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