



**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
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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 :Nazeem Ajez

Signature: N.AJEZ

Date:
18/03/22

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. The project charter is Version 4, however, there is no change to the previous Version 3. This is misleading to the project completion documentation, if there is no change on the project charter, the Version 3 of the document should still be current.
- b. The Version 4 of the project charter still mentions "NEW CONTRACTOR TO BE PROCURED", as this is the final version, this should have the new excavation contractors name, as it should be known by now.
- c. Section 6.1 Stakeholders, of the final version of the project plan outlines J.P. Digging as the earthmoving contractor, this is not true and requires updating to the correct earthmoving contractor. This is also the case in Appendix 12, 17, 20, and 26 which outlines J.P. Digging.
- d. Project archives checklist not yet completed.

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	20 April 2017
Project Manager	Sam Ng
Lessons Learnt Number	1
Lesson Learned Proposed Name:	Subcontractor Management - J.P. Digging
Project Team Role:	Project Delivery
Process Group*	
☐ Initiating ☐ Planning ☒ Executing ☐ Controlling ☐ Closing	
Specific project management process being used:	
Procurement Management	
Specific practice, tool or technique being used:	
Administer Procurements	
What action was undertaken?	J.P. Digging was requested to be removed by the client.
What was the result?	J.P. Digging removed and new contractor procured.
What might have been a more preferred result?	Keep J.P. Digging onsite for full duration of contract.
What might have created the more preferred result?	Improved administration of the contractor.
What is the specific lesson learnt?	

Monitor contractors and have regular meetings with all involved to ensure the client is satisfied with the works underway.

How could one identify a similar situation in the future?

Discussions and meetings with the client regularly to monitor their happiness with the contractors being used onsite.

What behaviour is recommended for the future?

Review the contractors works at all times and hold regular meetings/ audits to ensure works are proceeding as per the required expectations.

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

Throughout the full duration of the project whilst dealing with external contractors completing works.

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	20 April 2017
Project Manager	Sam Ng
Lessons Learnt Number	2
Lesson Learned Proposed Name:	Team Morale
Project Team Role:	Project Delivery

Process Group*

☐	Initiating	☐	Planning	☒	Executing	☐	Controlling	☐	Closing
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Specific project management process being used:	
Human Resource Management	
Specific practice, tool or technique being used:	
Manage Project Team	
What action was undertaken?	Two landscapers left the company.
What was the result?	Requirement to replace the personnel in order to complete the works, applications and interviews process.
What might have been a more preferred result?	To keep the personnel onsite who know the job.
What might have created the more preferred result?	A better working/ team environment.
What is the specific lesson learnt?	
Ensure personnel are happy in their role and happy to come to work.	
How could one identify a similar situation in the future?	
Regular consultation with the project team and feedback processes.	
What behaviour is recommended for the future?	
Complete performance reviews, provide training, team building activities and overall discussions with the team to ensure day to day happiness is present.	
Where and how can this knowledge be used later in this current project?	
Throughout the full duration of the project to ensure the team has a high morale with optimum results.	
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

Lessons Learnt Documentation Template 3

Project Name	Cascade Peak Chalets Landscaping Project
Prepared by	Sam Ng
Date	20 April 2017

Project Manager	Same Ng			
Lessons Learnt Number	3			
Lesson Learned Proposed Name:	Environmental Management			
Project Team Role:	Project Delivery			
Process Group*				
☐ Initiating	☐ Planning	☒ Executing	☐ Controlling	☐ Closing
Specific project management process being used:				
Risk Management				
Specific practice, tool or technique being used:				
Risk Treatment				
What action was undertaken?	Due to abandonment of the project, rectification works were required after rainfall events.			
What was the result?	Additional costs to rectify damage.			
What might have been a more preferred result?	No damage to the works whilst the team was off site.			
What might have created the more preferred result?	Controlling the weather sensitive areas with additional environmental controls to ensure no damage occurs.			
What is the specific lesson learnt?				
When leaving site for a long duration, ensure site is ready for any type of weather.				
How could one identify a similar situation in the future?				
When weather forecasts are not ideal, controls should be reviewed and improved.				
What behaviour is recommended for the future?				
Ensure sites are secure and environmentally save before leaving site.				
Where and how can this knowledge be used later in this current project?				
Throughout the project, even if the site is shut over the weekend, the site should be safe for any type of environmental event.				
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:	Sam Ng	
Date:	20 April 2017	
Project Summary		
Scope (What was included and excluded)		
Inclusions: Stage 1 - Prebuilding: - Created access roads - Installed retaining walls Stage 2 - Building Support: - Building construction - Utilities installation (water and power supplies, septic system, etc) - Erosion control and environmental issues controls. Stage 3 - Planting and Landscaping: - Installation and planting and landscaping - Local stream diversion to safely run through the resort		
Exclusions - Milling and delivery of timber for the chalets or other materials to build the chalets - Sourcing, purchasing or delivery of services (cables, drain pipe, etc) - Any scope not covered in the Council approved plans.		
Cost (Budget vs. actual)		
Budget= \$550,000 and Actual = \$650,000		
Time (Estimate vs. Actual)		
Estimate = 9 months and Actual = 12 months		
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: <i>Process Review</i> - Describe all of the processes used during the planning, implementation and closure stages. <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. <i>Recommendations</i> – Make recommendations as a result of the lessons learned.		

Scope
Process Review 1. Collect requirements 2. Define scope 3. Create Work Breakdown Structure 4. Verify Scope 5. Control scope
Lessons Learnt Scope defined well throughout the project with the project charter. Alterations through change requests captured and scope changes adhered to.
Recommendations Continue this procedure in scope management on future projects.
Time
Process Review 1. Develop schedule 2. Control schedule 3. Develop milestones
Lessons Learnt The baseline schedule for the project was 9 months, however, after a few alterations to the project, the schedule increased to 12 months. Milestones were developed along the way and defined in the form of a Gantt chart.
Recommendations Project schedule was done efficiently throughout the project and alterations made to reflect the changes to make it easier for the client to understand. This worked well, this procedure should be followed on other projects.
Cost
Process Review 1. Estimate costs 2. Determine budget 3. Control cost
Lessons Learnt The costs were originally estimated with a \$550,000 budget, however, due to scope changes and other project changes (demobilising from site for a duration of time), the budget increased to \$650,000.
Recommendations Costs were managed correctly on the project and three quotes were obtained at all times. When a replacement subcontractor was required for the digging works, three quotes were obtained and the most suitable company put forth.
Quality
Process Review 1. Customer satisfaction 2. Prevention over inspection 3. Continuous improvement
Lessons Learnt Quality overall was good with the project and the customer was satisfied. Council standards and project drawings were obtained and adhered to.

Recommendations To ensure the client was happy, the J.P. Digging scenario could have been avoided, further subcontractor management was required in order to ensure the contractor was performing as per the clients expectations.
Human Resources
Process Review 1. Develop human resource plan 2. Acquire project team 3. Develop project team 4. Manage project team
Lessons Learnt Team performed well overall, however, two landscapers left the project/ company. This could have been avoided with better management of the employees.
Recommendations Complete performance reviews, provide training, team building activities and overall discussions with the team to ensure day to day happiness is present.
Communications
Process Review 1. Verbal communication 2. Non-verbal communication 3. Written communication
Lessons Learnt Communication throughout the lifecycle of the project worked well with both verbal and written communication. Updates were made to the required documents in a timely manner.
Recommendations Further communication techniques to be implemented in order to review and assess the subcontractors onsite. Additional communication with them along with the client could have resulted in J.P. Digging staying onsite.
Procurement
Process Review 1. Procurement management plan 2. Change requests 3. Make-or-buy decisions 4. Source selection criteria
Lessons Learnt Procurement on the project worked well with the subcontractor works and the own project works. All items for delivery were planned and scheduled in to allow the project to run smoothly.
Recommendations Procurement requirements of each task may have been added into the project schedule on the Gantt chart in an additional colour, this would allow the project team to assess the items required and ensure they are ordered, organised and delivered accordingly.

Risk
Process Review 1. Risk Register 2. Issues Register
Lessons Learnt Risks and issues on the project were not of a high quantity. Incidents onsite did not occur which is another positive. Registers were kept up to date with the issues faced, i.e. damages to the site and replacing lost plants.
Recommendations Ensure risk and issues registers are kept up to date. Review risks accordingly prior to leaving site, i.e. the site damage could have been avoided if relevant controls were put in place.
Project Integration
Process Review 1. Project charter 2. Project plan 3. Project schedule/ gantt chart 4. Project network diagram
Lessons Learnt The integration management plan on the project worked well and all required parties were notified of the project and it's intents.
Recommendations Improvement may be required in the structure of the revisions to ensure the personnel receiving the updates to documents are well aware of what the changes are to the previous revisions.

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).
1. Terrence Mackay - General Manager - Cascade Peak Hotel 2. Kim Nguyen - Director - Awesome Landscapes 3. Stephen Lyons - Planning Manager - Cascade Peak Shire Council 4. Kate Chan - Project Manager - Timber Home Construction 5. John Brown - Manager - Earthmoving Logistics
b. What information will each person need before the meeting?
The draft project report along with the completed project charter document and project plan .
c. Which documents (and which version number of each document) will need to be printed off for the meeting?
The project plan - version 5 including the relevant appendix, i.e. Lessons Learned Documentation and Project Completion Report and the Formal Acceptance and Closure templates. Also to be printed is the project charter - version 4, the project gantt chart - version 4, the project network diagram - version 4.
d. Which of these documents will require signatures?
The project charter and the project plan are to be signed off, including the formal acceptance and closure template in the project plan.
e. Who will need to sign off on these documents?
Terrence Mackay, Kim Nguyen and Kate Chan.
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 project objectives aligned with the objectives of Awesome Landscapes throughout the entire project. I think this is the case as the objective of Awesome Landscapes was to provide a project management team as well as provide the landscapers to complete the works. Throughout the lifecycle of the project, Awesome Landscapes was able to deliver on both these objectives. Assistance was provided throughout the project to the Project Manager and landscapers completed the site works as per the plans.

g. What needs to be done after the meeting to complete the closure of the project?

The project documentation must be archived, hence archiving is required after the meeting is held. This is to be done with the project archive checklist, which will also be filled in and archived with the project files.

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