



**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

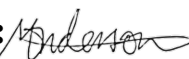
WORKBOOK:	Workbook 5
TITLE:	Integration Management
FIRST AND SURNAME:	Michael Anderson
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Please read the Candidate Declaration below and if you agree to the terms of the declaration sign and date in the space provided.

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 :Michael Anderson

Signature: 

Date:
25/01/2021

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. Issues register not completedb. Missing information on new Excavation contractorc. Project Gantt chart is missing a completion tick on; maintain road stage 2.1d. Version control does not indicate final version |
|---|

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	Michael Anderson
Date	19/04/2017
Project Manager	Sam Ng
Lessons Learnt Number	001
Lesson Learned Proposed Name:	Termination of contract J.P.D
Project Team Role:	Cotractor - Excavation & Digging
Process Group*	
☐ Initiating ☐ Planning ☒ Executing ☐ Controlling ☐ Closing	
Specific project management process being used:	
Human Resources	
Specific practice, tool or technique being used:	
Conflict resolution	
What action was undertaken?	J.P.D requested termination of contract due to previous conflict with Cascade Peak Hotel
What was the result?	Termination of contract and tender for new contractor
What might have been a more preferred result?	Continuity of contract till completion of project.
What might have created the more preferred result?	Meetings with Cascade Peak hotel and J.P.D to negotiate continuity to minimise impact on the project for the few months remaining.
What is the specific lesson learnt?	

Issues/risks should have been discovered through reference checks of previous projects

How could one identify a similar situation in the future?

In depth reference checks from previous projects the contractors have been employed on. Request information on quality of works and any issues which may have been presented.

What behaviour is recommended for the future?

High levels of communication, competence, stakeholder management and empathy

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

Additional projects and 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 2

Project Name	Cascade Peak Chalets Landscaping Project								
Prepared by	Michael Anderson								
Date	19/04/2017								
Project Manager	Sam Ng								
Lessons Learnt Number	002								
Lesson Learned Proposed Name:	Landscapers Job Security								
Project Team Role:	Landscapers								
Process Group*									
☐	Initiating	☐	Planning	☒	Executing	☐	Controlling	☐	Closing

Specific project management process being used:	
Human Resources	
Specific practice, tool or technique being used:	
Team Building	
What action was undertaken?	Project was ordered to stop as developers went into administration
What was the result?	Two landscapers resigned
What might have been a more preferred result?	Continuation of key staff through the project
What might have created the more preferred result?	Assurance of job security, temporary transfer to another project
What is the specific lesson learnt?	
Employees need to be reassured during uncertain times. Management team can seek alternate roles for employees impacted by down time.	
How could one identify a similar situation in the future?	
During times of uncertainty during a project or at completion there is potential for employees to seek alternate employment to not be left unemployed. This needs to be recognised by management and acted on	
What behaviour is recommended for the future?	
Communication between management and employees, achieve high level of moral and a sense of achievement and gratitude.	
Where and how can this knowledge be used later in this current project?	
Information on potential future projects can be relayed to employees to encourage their faith for future employment.	
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
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Prepared by	Michael Anderson
Date	19/04/2017
Project Manager	Sam Ng
Lessons Learnt Number	003
Lesson Learned Proposed Name:	Award program
Project Team Role:	Project Management team
Process Group*	
☐ Initiating	☒ Planning ☒ Executing ☒ Controlling ☒ Closing
Specific project management process being used:	
Human Resources management	
Specific practice, tool or technique being used:	
What action was undertaken?	It was noticed that morale in the office seemed to be low with employees lacking training and competency and conflict between staff.
What was the result?	Poor morale within the project team.
What might have been a more preferred result?	Strong team performance and team members feeling motivated to achieve their goals.
What might have created the more preferred result?	Initiating an awards program
What is the specific lesson learnt?	
There are various methods to keep morale high within a team, incentives and rewards are a great way to keep people motivated and exercise team building.	
How could one identify a similar situation in the future?	
Performance reviews, and communication	
What behaviour is recommended for the future?	
conducting performance reviews, providing training opportunities and good communication	
Where and how can this knowledge be used later in this current project?	
an awards program can keep the team motivated throughout all stages 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:

- 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:	Michael Anderson	
Date:	20/04/2017	
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.		
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)		
Original budget for the projects 3 phases totalled to \$550,000 before changes increasing the budget to \$650,000. Actual costs of the project totalled to \$514,892		
Time (Estimate vs. Actual)		
Completion of all work within twelve months. The project was moved forward to start 27/07/2016 and to finish on 04/04/2017. The Project commenced 27/07/2016 and final works and removal of greenhouse was completed on 12/04/2017		
Project Report Submitted to:		
Name: Terrance Mackay	Title: General Manager - Cascade Peak Hotel Pty Ltd	Date: 20/04/2021
Name: Stephen Lyons	Title: Planning Manager - Cascade Peak Shire Council	Date: 20/04/2021
Name: Kate Chan	Title: Project Manager - Timber Home Construction Ltd	Date: 20/04/2021
Name: Kim Nguyen	Title: Director - Awesome Landscapes Pty Ltd	Date: 20/04/2021

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

Our scope management plan clearly documented all project deliverables with clear identification of inclusions for each deliverable and identifying exclusions to avoid scope creep.

Lessons Learnt

The scope management plan was well prepared and relevant to our project.

Recommendations

No constructive recommendations are required for the scope

Time

Process Review

The project strived to adhere to our planned time schedule and was detailed within documents such as our gantt chart. Unfortunately there were unforeseeable delays, mainly due to 'Massive Eco Development Corporation' going into administration causing the project to cease works, until the project was acquired by Cascade Peak Hotel and the project was able to get back on track. The project also had identified key milestones that helped to keep us on track and work in timeframes to achieve the next milestone.

Lessons Learnt

Measures could be taken to ensure the stability and continued capital of the client. The project schedule was well planned and all areas which were in our direct control were well planned.

Recommendations

Cost

Process Review

The cost management plan was followed to achieve the project within our budgeted value. Our suppliers were required to quote for each task to assist with an accurate budgeting process. Scope and time variations were factors in this project, these were captured in our change control process and therefore updated into the project plan and avoided lost time and damages.

Lessons Learnt

A fixed price contract on a project of this scale could have been a high risk, thankfully Cascade peak hotel agreed to pay an extra amount to cover damages and get the project back on track.

Recommendations

Avoid fixed price contracts on projects of a high scale that could have few or many variations of which could impact the forecasted profitability of a project.

Quality
Process Review This project was highly governed by local council and building regulations. The strict regulations had to be adhered to, to achieve a high quality product in an environmentally sensitive area near a national park. All construction and landscaping including changes had to be approved by council prior to commencement. Our contractors operating equipment were to hold certain licences and competencies to be able to conduct works operating equipment and our labourers all had to hold appropriate qualifications in landscaping or horticulture as well as a national park landscaper permit. As well as council holding monthly audits, internal auditing was conducted prior to the council auditors inspection. These were conducted on the completed landscaping work at the end of each stage by the project manager.
Lessons Learnt Ongoing Quality control and Quality assurance played a pivotal role in the successful completion of the project within our scope with minimal losses. Our processes worked well and should be continued in future projects.
Recommendations Maintain high quality control and assurance standards, regular internal audit checks to maintain compliance and ensure effective communication with all stakeholders.
Human Resources
Process Review The project was deemed to be a high priority project. Landscapers and other staff used in the project were to be requested to perform duties for this project over other projects or operational works they may have had. A good working relationship was kept with all stakeholders to achieve a high level of confidence and effective work practices.
Lessons Learnt Poor morale within the project team. Staff lacked training and general role competency. There are various methods to keep morale high within a team, incentives and rewards are a great way to keep people motivated and exercise team building. Two labourers left the project when the project was shutdown due to the uncertainty of future works. This added to the issues caused by the shut down and a high priority was required to be placed on replacing them.
Recommendations Initiating an awards program. Conducting performance reviews, providing training opportunities and good communication. In times of uncertainty in the continuity of a project, actions could be taken to provide positive reinforcement and avoid losing labour unnecessarily causing further issues to resolve.
Communications
Process Review Our communications plan was adhered to throughout the project, regular meetings were scheduled appropriately to hold a strong connection with all stakeholders involved and created a healthy working relationship.

Lessons Learnt There was a conflict with one of our subcontractors and Cascade Peak Hotel which had arisen from previous experience with each other. As a result the Subcontractor was terminated and was required to be replaced. This could have been avoided by effective tendering processes and reference checks.
Recommendations Ensure to maintain compliance and minimise similar issues occurring on future projects.
Procurement
Process Review There was no contractor selection process for this project, this caused some issues down the line between one of our contractors and the new developers who have had previous conflicts, and caused the termination of contract at the subcontractors request. The project administrator kept on top of invoices and was effective in the role to take pressure off of the PM.
Lessons Learnt Contractor selection process to be implemented for all future projects.
Recommendations Contractor selection would be advised on most projects to make sure we are staying competitive and getting good quality contractors at reasonable prices.
Risk
Process Review The risk management plan covered many processes to try and capture all risks involved as well as highlighting our strengths and how we can foresee the project travelling. We have had strong past experiences prior to the project in delivering similar projects and working in environmentally sensitive areas. Using the hierarchy of controls we were able to best deal with reducing risk within the project.
Lessons Learnt Risks were well managed, processes and procedures outlined and clear reporting was completed.
Recommendations Continue with current processes and tools.
Project Integration
Process Review Change control process was very effective in identifying and documenting changes. All auditing done on site kept the job running smoothly throughout the project and avoiding scope creep. After the developers went into administration our auditing processes were effective in picking up what damages were caused and needed to be acted on during the time off the project.
Lessons Learnt The change control process worked well to make sure all changes were approved by all of the necessary people and changes were clearly documented and the project plan was updated accordingly with colour coding to clearly see details of change throughout the plan.
Recommendations Project integration ran smoothly during the project.

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

Kim Nguyen – Director – Awesome Landscape Pty Ltd

Sam Ng – Project Manager – Awesome Landscape Pty Ltd

Stephen Lyons – Planning Manager – Cascade Peak Shire Council

Kate Chan – Project Manager – Timber Home Construction Ltd

- b. What information will each person need before the meeting?

Project completion report, finalised project plan

- c. Which documents (and which version number of each document) will need to be printed off for the meeting?

final project completion report, final version of the project plan Project archives checklist, formal acceptance and closure
d. Which of these documents will require signatures?
final project report, finalised project plan and the final handover form
e. Who will need to sign off on these documents?
Terrence Mackay, Kim Nguyen, Stephen Lyons
f. Do you believe the project objectives aligned with the objectives of Awesome Landscapes throughout the entire project life cycle? Explain your answer.
Yes, working closely with contractors and various stakeholders all objectives of the project were adhered to and environmentally minded. There were some damages to plants as the project was abandoned for a short time, this was out of our control.
g. What needs to be done after the meeting to complete the closure of the project?
After the meeting Awesome landscapes may raise an invoice to Cascade Peak Hotel for the final contract payment and then upon receipt of the final contract payment, all project documentation can be archived. There is a project archive checklist to be completed and checked off as documents are archived and relevant documents electronically and physically stored.

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