



**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

TABLE OF CONTENTS

This is an interactive table of contents. If you are viewing this document in Acrobat, clicking on a heading will transfer you to that page. If you have this document open in Word, you will need to hold down the Control key while clicking for this to work.

TABLE OF CONTENTS	3
ASSESSMENT WORKBOOK COVERSHEET.....	4
CASE STUDY	5
Instructions to Student.....	5
Introduction.....	6
WORKBOOK CHECKLIST	25

ASSESSMENT WORKBOOK COVERSHEET

WORKBOOK:	Workbook 5
TITLE:	Integration Management
FIRST AND SURNAME:	matt taylor
PHONE:	0415390008
EMAIL:	matthew_alex_taylor@hotmail.com

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 : matt taylor

Signature:

Date:
7/9/20

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)

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(username: cstclearner password: CstcPty@123)
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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. Change request 3 not showing new digging contractor statement of work, still representing JP Digging as contractor in tasks and procurement plan
- b. Project risk review not updated to reflect change request 3
- c. None of the change request are signed off or any signatory from the steering committee reflected in the project plan for the initial start of the project.
- d. No QA / test procedure sign off

What action was undertaken?	none						
What was the result?	Resignation of two employees						
What might have been a more preferred result?	Not to lose project team members						
What might have created the more preferred result?	Communication and better management of resource						
What is the specific lesson learnt?							
Better communicate project specific and manage human resources appropriate to reflect job security to employees.							
How could one identify a similar situation in the future?							
monitoring staff efficiency sick days etc							
What behaviour is recommended for the future?							
site bbqs good mentoring and positive communication for good moral							
Where and how can this knowledge be used later in this current project?							
monitor staff performance through out remainder of the job							
Who should be informed about this Lesson Learnt:							
Executive(s)	x	Project Manager(s)		Project team (s)		All staff	
Others	site manager						
How should this Lesson Learnt be disseminated?							
x	E-mail		Intranet/Web site		Tip Sheet/FAQ		Library
	Others						

Lessons Learnt Documentation Template 2

Project Name	<i>Cascade Peaks Lodge</i>								
Prepared by	matt taylor								
Date	3/2/17								
Project Manager	sam ng								
Lessons Learnt Number	2								
Lesson Learned Proposed Name:	training up skilling required								
Project Team Role:	manage improve project outcomes and deliverables								
Process Group*									
x	Initiating	x	Planning	x	Executing	x	Controlling		Closing
Specific project management process being used:									
staff training and upskilling									
Specific practice, tool or technique being used:									
staff mentoring and up skill									
What action was undertaken?		skills analysis done showing site manager needs additional training							
What was the result?		loose ends with previous scope of work with previous project							
What might have been a more preferred result?		supervisor had more training on task and people management the project sponsor would have not been left in the situation							
What might have created the more preferred result?		if supervisor ensured that no loose ends prior to change of project sponsor							

What is the specific lesson learnt?							
all member of the project need to be adequitly skilled and trained to deliver a succsesfull project (continue up skilling is a nesseary							
How could one identify a similar situation in the future?							
checking staff resumes prior to hiring constant anlysis and review of staff training and skills matrix and spreadsheets to ensure that they have the right skills for the given project							
What behaviour is recommended for the future?							
constant training and up skill of the project team							
Where and how can this knowledge be used later in this current project?							
training of site managers and landscapers will ensure a better final product for the project							
Who should be informed about this Lesson Learnt:							
x	Executive(s)	x	Project Manager(s)		Project team (s)		All staff
	Others	face to face meeting					
How should this Lesson Learnt be disseminated?							
x	E-mail		Intranet/Web site		Tip Sheet/FAQ		Library
	Others						

Lessons Learnt Documentation Template 3

Project Name	<i>Cascade Peaks Lodge</i>
Prepared by	matt taylor
Date	2/3/17
Project Manager	sam ng

Lessons Learnt Number	3								
Lesson Learned Proposed Name:	scope variation								
Project Team Role:	manage and control outcomes and deliverables								
Process Group*									
	Initiating	x	Planning	x	Executing		Controlling		Closing
Specific project management process being used:									
organising and managing									
Specific practice, tool or technique being used:									
change maagement									
What action was undertaken?	scope change at the start of the project to allow for construction of additional chalets awesome landscape identified a need for a change in the landscaping works for the chalets to be constructed								
What was the result?	delay in deliverables to site budget and time								
What might have been a more preferred result?	additional scope should have been included in the original project plan								
What might have created the more preferred result?	the extra scope of works could have been identified before commencement og the project better communication of all stake holders prior to comencment								
What is the specific lesson learnt?									
the need for formal lines of communication in all persons relevant to the project to identify any changes current or future to be communicated to all parties									
How could one identify a similar situation in the future?									
when there is a project that has multiple stake holders involved break down the project into smaller phases so project is easier to track and manage									

What behaviour is recommended for the future?						
open communication between all stake holder of the project						
Where and how can this knowledge be used later in this current project?						
after the new project sponsor has taken over the project the scope has now changed this need to be clearly communicated and defined to all contractors and mangers so works can be completed on time and on budget						
Who should be informed about this Lesson Learnt:						
	Executive(s)	x	Project Manager(s)	x	Project team (s)	All staff
	Others					
How should this Lesson Learnt be disseminated?						
x	E-mail		Intranet/Web site		Tip Sheet/FAQ	Library
	Others	face to face meeting				

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.

Exclusions

Stage 1 – Pre-building

**Removal of vegetation in areas being cleared and replanting/
maintaining the plants for replanting in stage 3.**

- Sourcing and maintenance of any additional native plants to be planted at the end of the project.
- Removal of trees (these will remain in the ground, and buildings will be erected around them).
- Planting of new trees.

Access roads through the existing forest for builders to access each building site.

- Sealing of roads or car park.
- Maintenance of main road up the mountain to the resort property.
- Construction of any foot paths.
- Construction of any bridges, culverts.
- Construction of any electrical services (e.g. street lighting, power access to chalet sites, etc.).

Retaining walls to provide stability around the buildings.

- Construction of foundations.
- Planting around retaining walls.

Stage 2 – Building Support

Monitoring the building site for erosion, subsidence or other environmental issues.

- Monitoring and maintaining partially and fully constructed buildings. ○
- Monitoring and maintaining the main road.
- Creation of additional retaining walls.
- Onsite security (this is provided by the chalet development project). ○
- Any building, decorating or furnishing of the chalets.

Excavation for incoming utilities (electric cable, water supply, etc.).

- Installation of utilities.

Cost (Budget vs. actual)

Budget of \$444,253 actual cost of \$514,892

Time (Estimate vs. Actual)

Project time line of 12 months instead of 9 months

Project Report Submitted to:

Name: terrance
mackay

cascade peak hotel
(project sponsor)

Date: 20/3/17

Name: Kim Nguyen

Title: director awesome
landscapes

Date: 20/3/17

Name: stephen lyons

Title: local authority

Date: 20/3/17

Name: kate chan

Title: project manager
(timber home
constructions)

Date: 20/3/17

Analysis of Project

Guidance:

- Process Review* - Describe all of the processes used during the planning, implementation and closure stages.
- 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.
- Recommendations* – Make recommendations as a result of the lessons learned.

Scope

Read and understand the project requirements and specification, highlight any possible issues and communicate them with project steering committee. Ensure there is constant communication reflecting the projected milestones and occurring issues and implement change request when necessary.

Update project plant and schedules to reflect changes made and communicate changes with project committee.

Change excavation contractor due to different ownership.

Ensure human resources is able to meet project requirements, up skill or source suitable skill set.

Audit and collate all QA documents and change request for final inspection, review and sign off.

Review and audit project issues and restraints and reflect findings in project closure.

Lessons Learnt

Understand project milestones

Update project timeline to reflect change request and change of ownership

Communicate any changes and issues with the schedule to the project steering team ensuring an understanding of the extended project timeline.

Recommendations

Check supply/demand requirements of materials

Time

Process Review

Cash flow didn't match completed task at start of project.
Itemise cost to reflect completed tasks, to ensure projects remains on budget.
Update cost schedule to reflect change requests and project timeline
Request adjustment to procurement payments to match change request to allow for easier payment of invoices.

Lessons Learnt

Ensure cost procurement cover any change request that are approved.

Recommendations

Communicate any change request with updated cost schedule to steering committee.

Cost

Process Review

Understand inclusions and exclusion of project

Project team members understand the standard of quality that need to be delivered
Reviewing of completed works and contactor

Contractors understand project specific environmental standards to uphold.

Lessons Learnt

Hire contractors with previous experience in similar quality demanding projects

Recommendations

Research contractors or ask for preferred contractors recommended by project team

Quality

Process Review

Understand project tasks and recruit project team to meet requirements

Ensure all members understand allocated tasks and understand company methods. All workforce is trained and project specific qualifications.

Lessons Learnt

Site manager not meeting communication requirements

Recommendations

Constantly up skill or hire experience workforce

Human Resources
Process Review - Reoccurring meeting to discuss project specifics - Audit and document project outcomes - Communicate project changes in form of meeting, toolbox talks or email
Lessons Learnt Site management not meeting project communication demands
Recommendations Reoccurring weekly company review and meeting, followed by employee upskilling and reviewing.
Communications
Process Review - Reoccurring meeting to discuss project specifics - Audit and document project outcomes - Communicate project changes in form of meeting, toolbox talks or email
Lessons Learnt Site management not meeting project communication demands
Recommendations Reoccurring weekly company review and meeting, followed by employee upskilling and reviewing.
Procurement

Human Resources

Process Review

Reoccurring meeting to discuss project specifics

- Audit and document project outcomes

Communicate project changes in form of meeting, toolbox talks or email

Lessons Learnt

Site management not meeting project communication demands

Recommendations

Reoccurring weekly company review and meeting, followed by employee upskilling and reviewing.

Communications

Process Review

Reoccurring meeting to discuss project specifics

Audit and document project outcomes

Communicate project changes in form of meeting, toolbox talks or email

Lessons Learnt

Site management not meeting project communication demands

Recommendations

Reoccurring weekly company review and meeting, followed by employee upskilling and reviewing.

Procurement

Process Review

Understand budget and timeline

Source suitable suppliers and contractors

Reflect procurements payment to reflect project timeline and tasks completion Communicate procurement changes that are required due to change requests

Lessons Learnt

Payments need to meet change request requirements

Recommendations

Communicate change request with costing and timeline schedule.

Risk

Process Review

Brains storm possible project risks

Communicate between project team a management plan for risk incurred with inclement weather and natural disaster.

Implement risk into project plan

Educate and communicate management plan to project team

Lessons Learnt

Combine season change and extended project timeline affected plant health therefore had to be replaced.

Delegate greenhouse maintainer for duration of stand down period to ensure plants are health and able to be replanted instead of purchasing new plants to meet project quality requirements.

Process Review

Understand new project sponsors and their concerns

No real changes needed to project plan due the structure was well formatted for the project

Well formatted project plan helps communicate project deliverable to new sponsor when project ownership changes.

Future project plans to mimic format presented for Cascade Peaks projects.

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, Stephen Lyons, Kate Chan, Kim Nguyen and Sam Ng.

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

location for dten and time for meeting to be held what they need to bring to the meeting and what draft documentation they wanting bring to the meeting

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

Version 4 Project

plan Project completion report

Final version of the project plan

Project archives checklist

formal acceptance and closure documentation for sign off

- d. Which of these documents will require signatures?

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