



**SUCCESSION  
TRAINING**

# **BSB51415 Diploma of Project Management**



## **Integration Management**

**Version 1.01 Produced 18 October 2018**

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Version control & document history

| <b>Date</b>     | <b>Summary of modifications made</b>                  | <b>Version</b> |
|-----------------|-------------------------------------------------------|----------------|
| 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: | Brad Kayll                                                       |
| PHONE:             | 0422800669                                                       |
| EMAIL:             | <a href="mailto:kowboy_54@hotmail.com">kowboy_54@hotmail.com</a> |

**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 :** Brad Kayll

**Signature:** BK

**Date:**  
02/08/2020

## CASE STUDY

You have already provided advice to them in the previous four workbooks.

Your task is to evaluate the supplied project documentation and to ensure all due diligence has been completed.

**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. All of the status reports regarding the job have not been completed.
- b. All of the documentation concerning the replacing of the contractor has not been finalised and needs finishing.
- c. The issues register has not been finalised also.
- d. The projects cash flow and diagram have not been finalised.



|                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                               |                  |   |           |  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|---|-----------|--|
| What action was undertaken?                                                                                                                           | There was a change in scope at the beginning of the project to allow for the construction of additional chalets. Awesome Landscapes raised variation that needed to be sorted out by the principal contractor which allowed us to proceed with the completion of the additional chalets which we had not been informed about. |                  |   |           |  |
| What was the result?                                                                                                                                  | Change of budget, adjusted timeframe of the project and the reactive measures that followed.                                                                                                                                                                                                                                  |                  |   |           |  |
| What might have been a more preferred result?                                                                                                         | Adjust the timeframe of the project, change of the budget and reactive measures                                                                                                                                                                                                                                               |                  |   |           |  |
| What might have created the more preferred result?                                                                                                    | The additional scope was added into the plan at the initial stage of the project. Also correct the change request procedures.                                                                                                                                                                                                 |                  |   |           |  |
| What is the specific lesson learnt?                                                                                                                   |                                                                                                                                                                                                                                                                                                                               |                  |   |           |  |
| Variation of Scope                                                                                                                                    |                                                                                                                                                                                                                                                                                                                               |                  |   |           |  |
| How could one identify a similar situation in the future?                                                                                             |                                                                                                                                                                                                                                                                                                                               |                  |   |           |  |
| One would need to understand the project plan in extreme detail, that is, the ins and outs of all the inclusions and excisions of the entire project. |                                                                                                                                                                                                                                                                                                                               |                  |   |           |  |
| What behaviour is recommended for the future?                                                                                                         |                                                                                                                                                                                                                                                                                                                               |                  |   |           |  |
| A more proactive behaviour would be recommended, that is get to know the project plan in more detail.                                                 |                                                                                                                                                                                                                                                                                                                               |                  |   |           |  |
| Where and how can this knowledge be used later in this current project?                                                                               |                                                                                                                                                                                                                                                                                                                               |                  |   |           |  |
| Identification procedures                                                                                                                             |                                                                                                                                                                                                                                                                                                                               |                  |   |           |  |
| Who should be informed about this Lesson Learnt:                                                                                                      |                                                                                                                                                                                                                                                                                                                               |                  |   |           |  |
| Executive(s)                                                                                                                                          | Project Manager(s)                                                                                                                                                                                                                                                                                                            | Project team (s) | X | All staff |  |
| Others                                                                                                                                                |                                                                                                                                                                                                                                                                                                                               |                  |   |           |  |
| 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 Chalet Project</i>                                                                                                                                                                                                       |   |           |   |             |         |
| Prepared by                                           | <i>Brad Kayll</i>                                                                                                                                                                                                                         |   |           |   |             |         |
| Date                                                  | <i>02/08/2020</i>                                                                                                                                                                                                                         |   |           |   |             |         |
| Project Manager                                       | <i>Sam Ng</i>                                                                                                                                                                                                                             |   |           |   |             |         |
| Lessons Learnt Number                                 | <i>2</i>                                                                                                                                                                                                                                  |   |           |   |             |         |
| Lesson Learned Proposed Name:                         | <i>Deficiencies in the recording process</i>                                                                                                                                                                                              |   |           |   |             |         |
| Project Team Role:                                    | <i>Manage and minimise project outcomes and deliverables</i>                                                                                                                                                                              |   |           |   |             |         |
|                                                       |                                                                                                                                                                                                                                           |   |           |   |             |         |
| Process Group*                                        |                                                                                                                                                                                                                                           |   |           |   |             |         |
|                                                       |                                                                                                                                                                                                                                           |   |           |   |             |         |
| Initiating                                            | Planning                                                                                                                                                                                                                                  | X | Executing | X | Controlling | Closing |
|                                                       |                                                                                                                                                                                                                                           |   |           |   |             |         |
| Specific project management process being used:       |                                                                                                                                                                                                                                           |   |           |   |             |         |
| Quality Assurance, quality control and record keeping |                                                                                                                                                                                                                                           |   |           |   |             |         |
|                                                       |                                                                                                                                                                                                                                           |   |           |   |             |         |
| Specific practice, tool or technique being used:      |                                                                                                                                                                                                                                           |   |           |   |             |         |
| Gantt Chart, Quality Audits and the Project Plan      |                                                                                                                                                                                                                                           |   |           |   |             |         |
|                                                       |                                                                                                                                                                                                                                           |   |           |   |             |         |
| What action was undertaken?                           | Unsatisfactory recording of the project plan                                                                                                                                                                                              |   |           |   |             |         |
| What was the result?                                  | The result, is that we have had a lot of confusion with the entire scheduling including budgets. The project still needs to be completed but the uncertainty of what delays or issues will be caused by the early changes in the project. |   |           |   |             |         |

|                                                                                             |                                                                                                                                                          |                   |               |           |
|---------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|---------------|-----------|
| What might have been a more preferred result?                                               | Works continuing on schedule and the project finishing at the original proposed date.                                                                    |                   |               |           |
| What might have created the more preferred result?                                          | The correct and timely recording of new relevant data in the original project plan and in turn updating the project plan when appropriate and correctly. |                   |               |           |
| What is the specific lesson learnt?                                                         |                                                                                                                                                          |                   |               |           |
| That correct procedures in the recording processes need to be adhered to.                   |                                                                                                                                                          |                   |               |           |
| How could one identify a similar situation in the future?                                   |                                                                                                                                                          |                   |               |           |
| Quality assurance audits.                                                                   |                                                                                                                                                          |                   |               |           |
| What behaviour is recommended for the future?                                               |                                                                                                                                                          |                   |               |           |
| A proactive behaviour where recording processes are kept up to date                         |                                                                                                                                                          |                   |               |           |
| Where and how can this knowledge be used later in this current project?                     |                                                                                                                                                          |                   |               |           |
| This knowledge can be used for the rest of the project and more importantly, in the future. |                                                                                                                                                          |                   |               |           |
| Who should be informed about this Lesson Learnt:                                            |                                                                                                                                                          |                   |               |           |
| Executive(s)                                                                                | Project Manager(s)                                                                                                                                       | Project team (s)  | X             | All staff |
| Others                                                                                      |                                                                                                                                                          |                   |               |           |
| 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 Cascade Peaks Chalet Project

Prepared by Brad Kayll



|                                                                                                       |              |                          |                    |
|-------------------------------------------------------------------------------------------------------|--------------|--------------------------|--------------------|
| What behaviour is recommended for the future?                                                         |              |                          |                    |
| Early and proactive behaviour                                                                         |              |                          |                    |
| Where and how can this knowledge be used later in this current project?                               |              |                          |                    |
| If we learn from our mistakes then we can easily use this knowledge for the remainder of the project. |              |                          |                    |
| Who should be informed about this Lesson Learnt:                                                      |              |                          |                    |
| <input type="checkbox"/>                                                                              | Executive(s) | <input type="checkbox"/> | Project Manager(s) |
| <input checked="" type="checkbox"/>                                                                   |              | <input type="checkbox"/> | Project team (s)   |
| <input type="checkbox"/>                                                                              | Others       |                          |                    |
| How should this Lesson Learnt be disseminated?                                                        |              |                          |                    |
| <input checked="" type="checkbox"/>                                                                   | E-mail       | <input type="checkbox"/> | Intranet/Web site  |
| <input type="checkbox"/>                                                                              |              | <input type="checkbox"/> | Tip Sheet/FAQ      |
| <input type="checkbox"/>                                                                              | Others       |                          |                    |
| <input type="checkbox"/>                                                                              |              | <input type="checkbox"/> | Library            |

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.







|                                                                                                                                                                                                                            |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Process Review</p> <p>Many progress reports detailing status of the project were not included in the project plan.</p>                                                                                                  |
| <p>Lessons Learnt</p> <p>To make the project plan of value, communications documentation needs to be included.</p>                                                                                                         |
| <p>Recommendations</p> <p>All progress status reports need to be reported in the project plan and need to be communicated to the project team.</p>                                                                         |
|                                                                                                                                                                                                                            |
| <b>Procurement</b>                                                                                                                                                                                                         |
| <p>Process Review</p> <p>A change in the excavation contractor during the middle stages of the project.</p>                                                                                                                |
| <p>Lessons Learnt</p> <p>The new contractor was a success even though it was a generally rushed process to replace the former contractor</p>                                                                               |
| <p>Recommendations</p> <p>Have back ups of all contractors just in case a problem like this occurs in the future.</p>                                                                                                      |
|                                                                                                                                                                                                                            |
| <b>Risk</b>                                                                                                                                                                                                                |
| <p>Process Review</p> <p>The risk of change of ownership was never seriously considered</p>                                                                                                                                |
| <p>Lessons Learnt</p> <p>Stakeholder and subsequent staff changes were not considered in any risk management processes or documentation requiring imd project interviews and hiring.</p>                                   |
| <p>Recommendations</p> <p>These risks need to be considered on future projects as anything can and often does happen, and therefore need to be documented in future projects.</p>                                          |
|                                                                                                                                                                                                                            |
| <b>Project Integration</b>                                                                                                                                                                                                 |
| <p>The project ownership change did not have a major impact on the integration of the project.</p>                                                                                                                         |
| <p>Lessons Learnt</p> <p>The project plan overall had positively strong procedures that meant the project was kept on course even though we had distractions like a change in the major stakeholder and staff changes.</p> |

### Recommendations

Future project plans should include project status reports and project history of other projects included to provide backgrounds for similar 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).

Stephen Lyons: Planning Manager - Cascade Peaks Shire Council

Terrence McKay - General Manager - Cascade Peaks Hotel

Kate Chan - Project Manager - Timber Home Construction Ltd

Kim Ngyuen - Director - Awesome Landscapes Pty Ltd

Sam Ng - Project Manager - Awesome Landscapes Pty Ltd

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

Location, minutes and times of the meeting, any documents that need to be signed off at the meeting and any information that needs to be communicated to the committee.

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

An updated final version of the project charter and project plan. Revision 1 of the final project report. And finally the project sign off sheet.

d. Which of these documents will require signatures?

All of the above documents will require signatures at this stage.

e. Who will need to sign off on these documents?

The signatories of the steering committee will be required to sign off on these documents.

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 did align with Awesome Landscapes major vision which is that of delivering a successful project in sensitive environmental areas under budget and on time.

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

The project manager will require all documentation to be correctly signed off . Final invoices will be issued and need to be paid in full. Project documents are required to be archived correctly.

## 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**