<p style="text-align:center">Book Review
PMP® Project Management Professional Study Guide
Author: Kim Heldman, PMP, Sybex, Alameda CA 2002
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AEW Services, Vancouver, BC, Canada, 2002</p>

Introduction

From time to time I receive books for review and comment, perhaps because I claim to be a project management "expert". No doubt we could have a discussion on what constitutes an "expert, but be that as it may, I try to give the author an honest and objective assessment. Naturally this assessment is offered from my perspective of the world of project management.

Occasionally, a book comes my way that I think has particular merit and is worth published comment. In my view, the PMP Project Management Professional Study Guide (PMP-SG) is such a book. As the name implies, the PMP-SG has been written specifically to support project management practitioners studying for the PMP certification exam and its basis is the Project Management Institute's ("PMI") Guide to the Project Management Body of Knowledge ("PMBOK Guide"). The author, Kim Heldman, has over ten years of project management experience, most recently involving information technology based projects. Her authorship is supported by two technical editors, Claudia Baca, PMP, and Patti Jansen, PMP, both with backgrounds in the systems-software-technology fields.

I find the PMP-SG particularly interesting because it is a sincere and significant attempt to "interpret" the Institute's PMBOK Guide. It enables the material in the guide to be more easily learned, or perhaps presented in class. However, a review of the book also provides an opportunity not just to evaluate it, but to observe how others might view the contents of the PMBOK Guide. This could lead to ways in which that document might be improved to remove misinformation and misunderstandings.

The PMP-SG includes a large number of PMP exam type questions for students to use for practice. The whole book is also repeated on a CD, convenient for studying on-the-go, provided that you have your lap top with you of course. The CD also features a testing engine for evaluating your score and also provides learning flash cards for PCs and Palm Handhelds as a learning tool. However, I was disappointed that although the main text is written as a PDF file, it is not readable on a Mac machine. The book is priced at around US$60 which struck me as good value – certainly a lot cheaper than purchasing the list of books hitherto recommended for the PMP course.

About the content in general

The structure of the book follows the project management (PM) process sequence, and PMI-PMP exam learning objectives, of Project Initiation (chapters 2 &3); Project Planning (chapters 4, 5, 6 & 7); Project Execution (chapters 8 & part 9); Project Control (chapters 9 & 10); Project Closing (chapter 11) and Professional Responsibility (chapter 12). As a I mentioned earlier, the basic source is the PMBOK Guide and as readers of the Guide well know, the PMBOK Guide consists of twelve chapters each dedicated to a particular project management knowledge specialty area. Since each of these areas generally track through the PM process sequence it can be seen that Kim's book "slices the cake" in the

transverse direction.

As Kim says "Like the exam itself, this study guide is organized in terms of process groups and the natural sequence of events a project goes through in its life cycle."[1] I shall have comments to make on that later, nonetheless, in my view, she has done a masterful job of this translation, albeit difficult at times, and best of all, she even manages to make sense out of it. The book starts out with a description and benefits of PMP certification, the exam objectives and tips for taking it. A self-assessment set of 60 questions,[2] with explanatory answers in a subsequent section, helps to convince you to read the rest of the book or, at least, determine on which sections to concentrate. There are also review questions at the end of each chapter to check out what you've learned and two practice exams are included in the package to complete your studies. To be honest, I have tried very few of the questions for two very good reasons:

1) For the exam you need to know an awful lot of jargon specific to the PMBOK Guide that is not necessarily appropriate for your project environment, and
2) I am quite hopeless at multiple-choice questions anyway.

Each chapter identifies "Exam Essentials" and the key terms encountered in the chapter. This is a useful way to emphasize the exam topics and will satisfy those who are more concerned with passing the exam with minimum effort than with understanding the realities of project management. When trying to convey a broader knowledge of project management, rather than just parrot-like learning, class room teachers will be familiar with the students' cry "Is it on the exam?"

The book's content is illustrated from time to time with "Real World Scenarios" and a project case study. These are all projects from a business environment, perhaps because they represent the most "generic" type of project and are readily understood by exam takers. The topic text is in a similar vein which is perhaps not surprising considering that the author and technical editors are all from the IS/IT sector. Since this sector now represents the largest section of PMI membership, the book should appeal to the broadest audience.

The project life span

The project life cycle deserves special attention in my remarks. As an aside, does anyone think that we might now stop calling it a life *cycle* giving the impression that the project should go round in circles? While that might unfortunately be true on many projects, it is certainly not the intent of project management. The intent of project management is to drive a project forward through a series of periods, phases and stages tailored to the specific project and its particular development and implementation strategy. These time intervals should be reflective of the product and its environment. Driving a project forward means steering it through these intervals separated by "gates" as a means of ensuring control and continued support by all of the partners involved. More on "control" in a moment.

According to M. B. Patel and Prof. P.G. W. Morris in their document Guide to the Project Management Body of Knowledge published by the Centre for Research in the Management of Projects: "The life cycle is the only thing that uniquely distinguishes projects from non-projects".[3] So, you would have thought that the matter of the project life span would have received considerable attention. The project life cycle gets a good description in the first chapter of Kim's book,[4] but it is brief. But then the PMBOK

Guide only devotes one subsection to the topic and that is mostly illustrations of life cycles published elsewhere. So, this is a major weakness of the PMBOK Guide, especially for those who consider it a "standard".

But the project practitioner public is desperate for a methodology to apply to its projects, so Kim has done her best to develop the book with a project evolutionary structure. Like so many others, she may be forgiven for turning to the PMBOK Guide process groups "Initiating, Planning, Executing, Controlling and Closing"[5] as a collective surrogate for the project life span. Indeed, she actually refers to these labels as "phases".[6] Well, except for "Controlling" which is a situational response rather than a sequential response, it does look like a project life span, doesn't it?

The superficial reaction is that if the rest of the labels are phases then "Controlling" must also be a phase. This interpretation tends to be underscored by a Real World Scenario description: "The project is in the Controlling process . . ."[7] Good. Once we are done with the Controlling phase or process we don't have to worry about "Controlling" anymore! The waters get even more muddied when we read about the four Contracting Life Cycles of requirement, requisition, solicitation and award, under Measuring and Controlling Project Performance.[8]

For those who do not follow this line of thinking, the process group of "Initiating, Planning, Executing, Controlling and Closing" is intended, as Kim points out, to be a repetitive management process revisited throughout the project life.[9] That is to say, it really is a cyclical management effort. Figure 1 illustrates the relationships between the project management knowledge areas or functions, the project life span and the really cyclical management process of planning, organizing, doing, tracking and steering. I suspect that the problem is with the labels adopted for this central process group which leads to all this confusion. As an aside, slavishly following all the inputs and outputs to the process groups can lead to an awful lot of unnecessary bureaucracy, even on quite large projects.

The problem with this "Controlling" business is that having established this over-arching process group, the PMBOK Guide then needs to cover the subject in most of the separate knowledge areas. Realizing that control of one necessarily affects one or more of the others, the PMBOK Guide introduces the concept of Integrated Change Control.[10] Accordingly, Kim provides an in-depth look at Managing Integrated Change Control, Controlling and Control Techniques[11] by bringing together the corresponding references under each knowledge area in the PMBOK Guide. This is a valuable exercise if only to highlight how problematic is this whole area of control and controlling. There must be a better way. PMBOK Guide updaters, please take note.

Technical content

The author tries to stay close to the PMBOK Guide, but some of the problems show up in the text. For example, Kim says "A strange thing happens here. Resource requirements become an input to other Planning processes. But so do staffing requirements, which are a subset of resource requirements. This is the only process where an output is split into two pieces and each piece becomes an input to other processes."[12] By the way, does anyone believe that memorizing all these inputs and outputs for the exam really makes them a better project manager? And, for that matter, have all these inputs and outputs ever been tested on a real project?
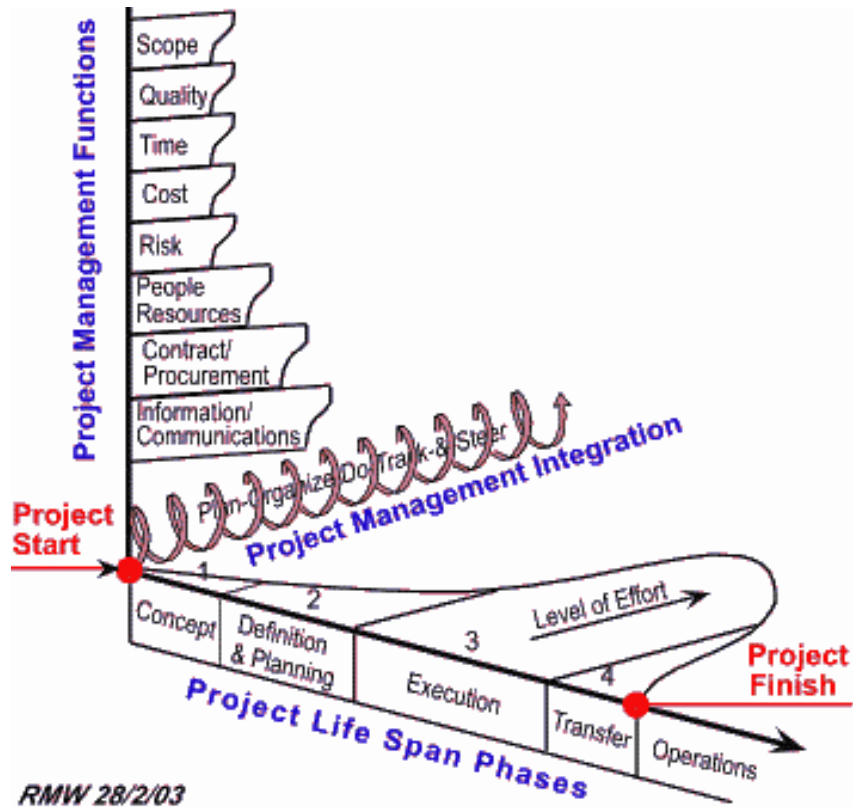
Figure 1: The Function-Process-Time relationship in project management

Indeed, it appears that Kim is not always comfortable with what the PMBOK Guide says and prefaces some remarks with a phrase such as "What the Guide to the PMBOK terms"[13]. The phrase "According to the Guide" also appears extensively[14] and it is not clear whether the author would otherwise beg to differ, or uses it just to emphasize the source of the information. Since we understand that many of the actual certification questions are sourced from other recommended documents, the statements in the PMBOK Guide could in fact be misleading.

I was surprised to learn from the PMP SG that project stakeholders are confined to the immediate project environment and do not include product operatives, i.e. the users, or members of the public.[15] Indeed, the book specifically differentiates stakeholders from users and customers[16] although the definition in the Glossary[17] is all-inclusive. In defining project stakeholders, the Guide to the PMBOK does include "individuals and organizations . . . whose interests may be positively or negatively affected as a result of project execution or project completion".[18] So it does include users, customers and the public who may be impacted by the results of the project, even if reluctantly.

I was dismayed to see many references to "triple constraint".[19] True it is mentioned in the PMBOK Guide but only to the extent that "Many project practitioners refer to the project triple constraint as a framework for evaluating competing demands."[20] That is true, perhaps because the triangle is a sexy symbol, but the reality is that there are four core constraints to project management and these consist of scope, quality, time and cost. To this list you might even add "customer satisfaction". This is especially important to remember when managing the project and assessing options and risks. It is high time that

the flawed concept of a triangle is laid to rest.

Another area of confusion in the project management arena is the difference between a scope statement and a statement of work. A scope statement should describe the product to be produced by the project and form the basis for a product-oriented breakdown structure. It does not serve as a statement of work.[21] The statement of work should describe the work involved in producing the product and it is this statement that enables activities to be identified and the time and cost of the project to be estimated. But Kim does a good job of describing how a work breakdown structure should be constructed[22] and neatly side steps the perennial discussion of whether its content should start with nouns or verbs. However, we think that it is not the lowest level in the WBS that is called a work package[23] but rather the lowest level *of any given branch* – not quite the same thing.

Pearls of wisdom

Notwithstanding my criticisms, the book is rife with good advice. For example: "Don't put the only two people in the whole company who can't get along together on the same project."[24] Or "You'll find on some projects you spend as much time planning the project as you do executing and controlling the project. This isn't a bad thing."[25] Or again "The project schedule should be approved and signed off by the stakeholders and functional managers. This assures that they have read the schedule, understand the dates and resource commitments, and will likely cooperate."[26] If you can manage to get those messages across to senior management you might just have a winner.

Under Cost Estimating Techniques, we learn that "Sometimes project managers are not responsible for the budget portion of the project. This function is assigned instead to a functional manager who is responsible for tracking and reporting all the project costs."[27] Very sad but very true. That means that one has authority without responsibility and the other has responsibility without authority – another serious enterprise management problem.

Kim provides some good practical illustrations. The project manager of a candy works is responsible for introducing a new product line into a continuous process. The problem is that the process cannot be economically stopped, cleaned and restarted every time a product line is to be changed. So there will inevitably be a period of production when the new line is likely to be "contaminated" by the previous line. The solution is to make this production change-over interval into a "mystery flavor" product line where the customer can expect to get something of either line.[28] Although this example is one of risk to product quality, the solution is a good example of turning a risk into an opportunity. The rest of the risk sections[29] provide good information.

I thought that the sections under Developing the Project Team[30] provided good succinct summaries of the topics referenced in the PMBOK Guide. In a "Real World Scenario" Kim describes the case of a catalog change project where the project team has worked a lot of overtime and weekend work to meet a deadline successfully. She describes how, in recognizing and rewarding the team for their outstanding efforts "You've arranged a slot on the agenda of the next all-company meeting to bring your team up front and praise them for their cooperation and efforts to get the catalog to the printers on time. You'll also present each of them with 2 days of paid time off and a gift certificate for a dinner with their family at an exclusive restaurant in the city." Tell me, just how and where do I sign up for Kim's next project?

Kim concludes this section by saying: "Project managers need to wear a lot of hats. This is one of the things that makes the job so interesting. You need organization and planning skills to plan the project. You need motivation and sometimes disciplinary skills to execute the project plans. You need to exercise leadership and power where appropriate. And all the while, you have a host of relationships to manage, including team members, stakeholders, managers, and customers. It's a great job and brings terrific satisfaction."[31]

Said like a true project manager.

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[1] PMP Study Guide p XIX

[2] PMP Study Guide p XXVIII

[3] CRMP Guide to the Project Management Body of Knowledge published by the University of Manchester, UK, 1999, p52

[4] PMP Study Guide pp22-23

[5] PMP Study Guide p24

[6] PMP Study Guide p264, under Resource Requirements Updates

[7] PMP Study Guide p372

[8] PMP Study Guide p331

[9] PMP Study Guide p25

[10] PMBOK Guide p47

[11] PMP Study Guide pp367-386

[12] PMP Study Guide p158

[13] PMP Study Guide p3, 129, 267, 376

[14] PMP Study Guide pp XXXVIII, li, 3, 8, 24, 52, 60, 71, 83, 87, 88, 95, 103, 117, 121, 123, 124, 128, 134,152, 196, 203, 204, 211, 216, 220, 256, 266, 295, 337, 340, 344, 368, 373, 382, 386, 409, 427, 487,

[15] PMP Study Guide p4

[16] PMP Study Guide p292

[17] PMP Study Guide p501

[18] PMBOK Guide p16

[19] PMP Study Guide pp 6, 16, 27, 28, 29, 32, 37, 59, 63, 64, 65, 124, 128, 192, 202, 210, 367, 368, 391, 443

[20] PMBOK Guide p29

[21] PMP Study Guide p54

[22] Constructing the WBS, PMP Study Guide p130

[23] PMP Study Guide p136

[24] PMP Study Guide p162

[25] PMP Study Guide p246

[26] PMP Study Guide p261

[27] PMP Study Guide p172

[28] PMP Study Guide p201

[29] PMP Study Guide pp201-222

[30] PMP Study Guide pp294-306

[31] PMP Study Guide p307