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Practical **PROJECT MANAGEMENT & PORTFOLIO STRATEGY** Masterclass

April 16–17, 2007, The Regent Hotel, Shanghai
April 19–20, 2007, Swissotel Hotel, Beijing



Author of Two
Best Sellers:



"Practical Project
Management" 2002
(Chinese Translation
Published in 2004)



Project Portfolio
Management 2005

Outstanding Masterclass facilitated by Mr. Harvey Levine

- ◆ 45 years of project management experience
- ◆ Former President and Chair of the Board of Directors of the Project Management Institute (PMI®)
- ◆ Recipient of PMI's 1989 Distinguished Recipient of the Project Management Award
- ◆ Elected a fellow of PMI
- ◆ Global Advisor to PM Forum
- ◆ Adjunct Professor of Project Management at Rensselaer Polytechnic Institute, Boston University and advisor to The George Washington University advanced program in project management
- ◆ 25 years consulting experience with the General Electric Company

What you will learn:

- Learn how to set-up a Project Management Office, choosing from several styles and options
- Tips on how to get a project started, including the development of Project Charter and baseline plans
- Probe critical path scheduling & Critical Chain methods of scheduling
- Find out how to conduct all aspects of project planning and control
- How to factor Risk into the plan
- How to manage contingency and change, including controlling scope creep
- How to measure project performance, and find areas that are deficient
- How to terminate projects (normal or early termination)
- How to communicate with project stakeholders
- A special session on Project Portfolio Management with a focus on selecting the most beneficial projects
- Tips on how to make project management work

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Why you cannot miss this Masterclass

This comprehensive, yet compact program will provide you with all that you need to know to establish a project management capability and to execute the fundamentals of project management. This exclusive masterclass is different from other project management programs in that it focuses on simplified, pragmatic approaches to project management that will allow you to apply these practices at any level from small projects with limited personnel to major, multi-project situations in large firms.

This masterclass is based on 50 years of expert development and implementation of project management best practices, capturing a wide range of successful applications. The instructor's own 45 years in this field has been fine-tuned in practice and through mentoring others, culminating in several books and articles that will provide additional documented information for attendees.

As a bonus, we will distribute a special packet of project management tips, tricks and traps that provide a checklist for practitioners.

Who should Attend

Any managers/head of department involved in the planning, development, execution of the project will clearly benefit from attending this conference.

- Project leaders and managers
- Project Coordinators
- Program and Portfolio Managers
- Team Leaders
- Group Managers
- Project Engineers
- Technical Manager
- Contract Managers
- Product Manager
- Operation
- Reliability and Maintenance
- Program Management
- Purchasing and Supply Chain

Send your entire project team and enjoy the preferential team rate! Call Gillian Zhou today on 86-21-5292 8862.

Your Masterclass Instructor – Harvey A. Levine



Harvey A. Levine is in his 45th year of service to the project management profession, providing applications, system design, & consulting services in project planning and control, mostly with the General Electric Company. From 1962 to 1986, he was instrumental in bringing computerized project management capabilities to over a half dozen divisions of that company, in several countries, including the development of project control methodologies, system specifications, systems selection, systems implementation, user training and management of the project control function. Applications include: Power Generation, Architect/Engineer, Aerospace, Information Systems, Design/Construct, Co-Generation, Telecommunications, Advanced Energy Systems, Nuclear, & Transportation. In 1986, Mr. Levine founded The Project Knowledge Group, a consulting firm specializing in making PM work.

Mr. Levine has been Adjunct Professor of Project Management at Rensselaer Polytechnic Institute, and at Boston University, and has been advisor to The George Washington University advanced program in project management. Mr. Levine is the author of three books. The most recent one is "Project Portfolio Management: A Practical Guide to Selecting Projects, Managing Portfolios, and Maximizing Benefits". These were preceded by: "Practical Project Management – Tips, Tactics and Tools" and "Project Management using Microcomputers". A Chinese translation of the second one was published in 2004. A frequent contributor to the literature on project management, he has published over 240 articles and whitepapers in the past 20 years, both in print and on websites.

Mr. Levine served on the Board of Directors of the Project Management Institute, as President and Chairman of the Board. PMI is a worldwide professional society of over 200,000 members. Mr. Levine was the recipient of PMI's 1989 Distinguished Contribution to Project Management award, and more recently was elected a Fellow of PMI. In addition, his standing in the project management community has been recognized via his association with Rensselaer Polytechnic Institute, Boston Univ., The George Washington Univ., AMA, ASCE, A/E/C Systems, IBM, and several leading technical publishers. He was just appointed Global Advisor to PM Forum and was selected for their PM Ambassador speaker's program.

Clients

Among the hundreds of consulting clients, Levine has worked with IBM, Xerox, Ford Motors, Fidelity Financial, AXA Financial, New York Life, Molex, Marriott International, National Aeronautics and Space Administration, Microsoft, Oracle, Apple, Symantec, AT&T, Bell Labs, Lucent, Entergy, AMR (American Airlines), Swiss Air, John Deere, Bose, Hoffman-LaRoche, Beringer-Ingelheim, Beringer-Mannheim, Henry Ford Health Care, Arnold Air Force Base, Toys-R-Us, KB Toys, Purolator, Sadi-Sadelmi (Italy), Promon International (Brazil), Métier (UK), General Electric (US and Belgium), State of Rio de Janeiro (Brazil),

Masterclass Agenda: 10 vital sessions to ensure

Registration starts at 8.30am on Day One. Course commences from 9.00 am to 5.00 pm for both days. There will be a break for lunch between 12.00 and 1.00 pm.

In this two-day program, you will follow the life cycle of a project, looking at the practices that have worked, the challenges, the communications, and attitudes that are required to succeed.

Session 1: Setting Up the Project Operation

Project Management doesn't just happen. Successful project management is the result of a structured and determined effort to develop practices and skills within an organization that has been deliberately designed to support project work and the management of that work.

In session 1, we show the way to set up the project management operation. We start with a general definition of projects and project management. We then discuss the general aspects of organizing for project management. We present a case for the Central Project Office and a Chief Project officer. And we outline the steps to implement a computer-based project management capability.

- Projects Definitions and Nomenclature
- The Project Life Cycle
- Organizing for Project Management
- The Project Management Office

Session 2: Project Initiation Techniques and Frameworks

Here, we discuss how to get the project off on a good foundation and in the right direction. We point out several common errors that contribute to project failure.

We continue our discussion of project organization and project teams, relating these items to the project initiation process. We introduce the concept of the Project Charter, as a means of authorizing and defining the project. We promote the concept of Strategic Planning, as an important process in project initiation. We introduce Work Breakdown Structures, Project Milestone Schedules and the Project Life Cycle.

- Getting Started with the Project
- The Project Charter
- Project Frameworks – Work Breakdown Structures
- Project Milestone Schedules

Session 3: Scheduling

To many people, project management is synonymous with scheduling. We know that project management is so much more than that. Nevertheless, it is scheduling that provides us with the foundation for many of the important functions that are part of the project management process. Without the definition of the work scope, and the scheduling of the work, we would not have a basis for planning the assignment of resources or for managing the cash flow. Furthermore, the timing of the work and the management of the project end date are two of the most watched and sensitive areas of most projects. So, without falling into a false sense that the schedule is everything, we must recognize that scheduling is a very critical component of the project management process.

We introduce the concepts of Critical Path Scheduling (CPM) and alternative approaches such as Critical Chain (CCPM). We discuss schedule contingency and risk. We discuss the importance of expediting schedules and pragmatic methods of shortening project duration.

- The Critical Path Method
- Schedule Analysis
- Factoring Contingency & Risk into Schedules
- Dealing with Uncertainty
- Resolving Schedule Delays
- The Benefits of Expediting Schedules

Session 4: Resource and Workforce Management

Resource scheduling presents a dilemma. We all know that efficient workforce planning and the scheduling of resources is critical to project success. A lot of money is spent on tools to aid in this function, and untold hours are devoted to developing pragmatic resource plans. The embarrassing truth is that much of this effort is wasted.

The old concept that we can describe a plan and an available workforce to a computer and let the computer create the perfect resource-based schedule is a fallacy, in my opinion. What we will do in this session is explore pragmatic ways to develop usable workforce plans so that we can integrate work schedules within resource availabilities.

- Resource Utilization Issues
- Resource & Cost Planning Concepts
- Resource Planning Practices
- Issues with Resource Leveling
- Balancing Schedule & Resource Constraints

Session 5: Budgeting and Cost Control

Budgeting and cost management tend to be handled differently within different industries and different companies. In many cases, the specific practices are dictated by accounting standards or government regulations. Our objective in this session is to provide an overview of project budgeting and cost control, especially with a focus on the integration of budgeting with work plans, and the development of baselines that can be used for a basis of performance measurement.

- Integrating Budgets & Cost
- Developing Cost Baselines
- Controlling Costs

Session 6: Risk Management and Contingency

The topics discussed in this session may very well be the most important of all the practices that can impact upon project success. We have all seen projects that have been proposed and sold with the (very poor) assumption that everything will go according to plan. I can tell you, with absolute certainty, that a project that has not considered the probability and impact of risk, and that does not contain contingencies to deal with such risk, will run well past its schedule due date, and way over budget. Such projects may have to be delivered with less than the promised scope and with less than the intended quality. That is, if the project is delivered at all.

... project success & minimize project failures.

... will be mid-morning and mid-afternoon refreshments. Lunch will be served from 12.30pm to 2.00 pm each day.

... have proven necessary for successful project execution, and the adjustments to organizations, roles, and processes to implement a project management capability.

There are pragmatic methods to address project risk and to mitigate risk probability and impact. There are practical ways to put contingency into a project budget, and to manage that contingency so that it is truly reserved for actual contingency events. We will discuss all of these in Session 6.

- Understanding & Managing Contingency
- Risk Identification, Mitigation and Management
- A WBS for Risk

Session 7: Maintaining the Plan

A question most frequently asked, by even experienced project managers, is: "How do I manage the project baseline and prevent the project scope from escalating?" We call this "Scope Creep" and it can destroy even a well-planned project.

In this session, we introduce exclusive concepts for managing contingency and scope creep as well as world-wide recognized techniques for managing project baselines. This leads perfectly into Session 8 (see below).

- Change Control and Scope Management
- Managing the Project Baseline
- Stating the Project
- Avoiding Scope Creep

Session 8: Performance Measurement

There are many reasons why we should implement some type of performance measurement routines as part of our project management practices. First of all, we need to know how well we are doing. We also need the ability to monitor who is performing well and who is not.

But there is so much more. Performance measurement practices, implemented early in the project, can provide an early warning of things that have gone amiss – in time for effective corrective action, at the least cost. Performance measurement data can support progress billing that is based on actual accomplishment, rather than a schedule of planned effort. These are just a few of the benefits.

Performance measurement is a key component of maintaining the plan. Therefore, in section 7, we presented some illustrations of practical applications of the Earned Value Analysis concept. In section 8, we continue to address common issues and misunderstandings about EVA and provide additional examples of very simple and practical uses of this extremely valuable tool.

- Measuring Schedule Performance
- Measuring Cost Performance
- Earned Value Analysis
- Forecasting

Session 9: Project Portfolio Management

Up to now, we have been looking at ways to manage projects and to make certain that the projects are completed with full scope and benefits, on time, and within budget. This assumes

that we are working on the right projects. That is: that we are allocating our limited resources to projects that will deliver the most benefits to the firm.

A newly emerging concept of Project Portfolio Management (PPM) addresses these issues. Using knowledge included in Mr. Levine's latest book on PPM, we expand the project lifecycle from the earliest point of project ideas and opportunities through project selection and execution and eventually to the realization of benefits. We introduce methods for the selection of projects, considering expected benefits, as modified by potential risk. We discuss the balanced portfolio and the alignment of projects with business strategic objectives. And we consider the possibility of early termination of projects that no longer support strategies, objectives or expected benefits.

- The Expanded Projects Life Cycle
- Organizing for PPM
- Ranking Projects for Expected Benefits
- Modifying Benefits based on Risk
- Aligning Projects with Strategies
- Project Selection
- Balanced Portfolios
- Maintaining the Project Portfolio (Managing the Pipeline)
- Applying Stage-Gate Techniques
- Project Termination Practices

Session 10: Making Project Management Work

Project Management is an ART. Project Management is a SCIENCE. Project Management is a PROCESS. Yes, it is all of these. But, most of all, Project Management is a lot of COMMON SENSE.

Without organizing for project management, and without establishing a set of project management practices, and developing a project management culture, project management is likely to fail. Yet, all of these are not enough to assure that any project management initiative will be successful. This is because project management cannot be solely an academic subject. Rather, it must be the practical application of the accumulated theory, knowledge and experience – about organizations, people, operations, and projects.

In this final session, we discuss the things that we need to do to make project management work. This includes training and commitment. It includes new styles of communication. It includes the building of teams and task forces, in a new model that relies on bringing people together from various groups to work on a common program using flexible, temporary workforces. Finally, it addresses the need to consider shared rewards for people who share responsibility.

- Commitment and Training to Ensure Success
- Project Communication
- Teams and Task Forces
- Shared Responsibilities and Rewards

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