# Crosswind Learning

# Crosswind Success Series:
# PMP® Exam Bootcamp Manual

**www.crosswindpm.com**

**Tony Johnson,** MBA, CAPM, PMP, PgMP, PfMP

# Section 3

# People

*Chapter 4: Roles and Organizations*

*Chapter 5: Resources*

*Chapter 6: Stakeholders*

*Chapter 7: Communications*

# Chapter 4

# Roles and Organizations

The roles of project team members and the structure of the organization have a major impact on the success of the project.

 If you are using this book to study for an exam, we recommend that you become familiar with the project management roles contained in this chapter and their characteristics. Remember that the role titles used by your organization may vary from those used in this manual and it is important that you understand project role titles from a project management perspective.

The structure of an organization is based on a number of factors that include:

- The type of market in which the organization must thrive (for example, Research & Development vs. Sales)
- The amount of functional (department) work necessary for the organization to thrive vs. the amount of project work necessary for the organization to thrive
- The priority of functional work in relation to project work
- The skills possessed by organizational staff
- The proximity of project staff to each other
- The location of the organization's sites

Some organizations may do an equal amount of functional work and project work. An organization that focuses on Research & Development may do project work exclusively. An organization that has a variety of store-front locations or a large sales infrastructure may do functional work primarily. Additionally, as organizations evolve, they are vesting more reliance in virtual teams for project work, since it allows them to include specialists located outside of the site where most project team members are located.

In this chapter, we discuss the following:

**Roles**

**Organizational Structures**

☑ **Crosswind "Must Knows" for Roles and Organizations**

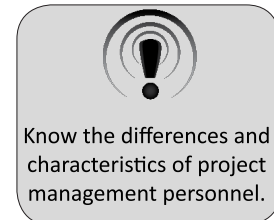| | |
|---|---|
| | Differences and characteristics of the personnel involved in project management |
| | Differences and characteristics of the personnel involved in agile and hybrid projects |
| | The role of the project manager |
| | How the project manager performs integration |
| | Characteristics of a functional organization |
| | Characteristics of a matrix organization |

| | |
|---|---|
| | Characteristics of a project-oriented (composite/hybrid) organization |
| | Characteristics of a multi-divisional organization |
| | Characteristics of an organic or simple organization |
| | Characteristics of a virtual organization |
| | Characteristics of a hybrid organization |
| | Characteristics of a PMO organization |

Although helpful, this list is not all-inclusive in regard to information needed for the exam.  It is only suggested material that, if understood and memorized, may increase your exam score.

## 4.1. Traditional Project Role Descriptions

The following table briefly describes the key traditional project roles and their primary responsibilities and interactions with other players.

Know the differences and characteristics of project management personnel.

| Traditional Project Role Descriptions | |
|---|---|
| **Role** | **Description** |
| **Portfolio Manager** | The role of the portfolio manager is to **provide governance at a high level** for assigned programs and projects. |
| **Portfolio Review Board** | The role of the portfolio review board is to determine which projects should be pursued based on its **review of each project** in terms of its value, risks, ROI, and other designated attributes. |
| **Program Manager** | The role of the program manager is to **manage assigned projects in a manner that will provide enhanced benefits** and to provide support and guidance to the project managers. |
| **Functional Manager** | The role of the functional manager is to **control resources** and to provide resources to project managers. |
| **Operations Management** | The role of operations management (or business process management) is to **manage an organization's day-to-day activities**.  In connection with project **results that are transitioned to operations,** operations management is responsible for **incorporating those results into normal operations and providing ongoing support**. |

| Traditional Project Role Descriptions | |
|---|---|
| **Role** | **Description** |
| **Sellers/Business Partners** | Sellers are **external entities** that contract to provide components or services for the project.  Sellers are also called vendors, contractors, and suppliers.<br><br>Business partners are external entities that have a special relationship with the organization and provide it with a service, such as training or expertise. |
| **Project Manager** | Reference Section 4.2 of this manual for detailed information. |
| **Project Management Team Member** | A project management team member is **anyone on the team who works on project management related items.**  Activities can include scheduling, cost budgeting, risk issues, and change management. |
| **Influencer** | An influencer is a **person or group indirectly related to a project.  An influencer can have a negative or positive influence** on the project. |
| **Project Coordinator** | A project coordinator is put into place if the organizational **structure doesn't support a full-scale project management environment** or the project manager needs additional support.  A project coordinator **acts as a communications link to senior management** and has some **limited decision-making abilities**. |
| **Project Expediter** | A project expediter is put into place if the organizational structure doesn't support a full-scale project management environment or the project manager needs additional support.  A project expediter **acts as a communications link to senior management** and performs activities such as **verifying completion of assignments and checking on the status of an undertaking.**  Typically, they **do not have decision-making abilities**. |
| **Performing Organization** | The performing organization is the **organization, a company within the organization, or a division** of the company that is **doing the work** of the project. |
| **Sponsor** | **The sponsor is responsible for providing resources and support for the project.**<br><br>In certain organizations, the sponsor may secure financing for the project, create the project charter, be responsible for the success of the project, and/or sign off on project completion.<br><br>Typically senior management **supports** the sponsor. |

| Traditional Project Role Descriptions | |
| --- | --- |
| **Role** | **Description** |
| **Project Team Members** | Team members are **those who actually do the work** that results in meeting the deliverables defined in the scope of the project. **They perform activities delegated by the project manager**, who assumes that they are competent to manage their own workload without the need for micromanagement. The primary difference between a team member and other stakeholders is that a team member **typically bills their time as a cost to the project**.<br><br>Team members include analysts, programmers, technical writers, construction personnel, and testers. Team members also include those performing roles such as:<br><br>• Project management staff<br>• Supporting experts<br>• Users or customers<br>• Sellers/business partners<br><br>The project team can be composed of:<br><br>• **Dedicated team members:** those who only work on the project<br>• **Part-time team members:** those who work on the project part-time<br>• **Virtual team members:** those who work from diverse locations and time zones and interact via technology<br>• **Partnerships:** joint ventures working together on the project |
| **Customer/User** | A customer or user is the person or group that makes use of the work of the project. The customer is the owner of the project work and will pay for it. The user is the end person/group using the work. |
| **Stakeholders** | **Stakeholders can be members of the project team** or anyone actively involved in or impacted by (negatively or positively) the project, such as:<br><br>• Consumers who depend on the project<br>• Those who are employed as a result of project completion and deployment<br>• Those whose job could be modified or eliminated by the completion of the project |

| Traditional Project Role Descriptions | |
|---|---|
| **Role** | **Description** |
| **Senior Management** | Senior management usually refers to management that supports the sponsor, the project charter, and ultimately the project.<br><br>Some of the activities that senior management undertakes include:<br><br>• Assisting with the prioritization of items associated with other projects<br><br>• Coordinating with other groups or activities that can interfere with the project<br><br>**Figure 4-1:  Senior Management Focus** |

## 4.2.   The Role of the Project Manager

In their efforts to realize the goals of their projects, project managers have important roles in the leadership of their teams.

Typically, project managers begin their roles at project initiation and continue them through project closure.

*Know the role of the project manager.*

There are organizations that engage project managers in pre-initiation assessment and analysis.  Pre-initiation assessment and analysis may include such activities as:

- Assisting with business analysis and business case development
- Working with executives and business leadership to flesh out ideas regarding
  - The enhancement of organizational performance
  - The promotion of strategic objectives
  - Meeting customer needs

There are also organizations that engage project managers in post-closure activities that are related to the realization of business benefits derived from the project.

While project managers are not expected to have the ability to perform all project roles, they should have technical knowledge and a thorough understanding of, and experience in, project management.

### 4.2.1. Sphere of Influence

The sphere of influence for project managers includes governance, the portfolio steering committee, the PMO, regulatory bodies, the project sponsor, end users, the project team, other project managers, program managers, resource managers, customers, shareholders, suppliers, and competitors.

Project managers perform a variety of roles within their sphere of influence and in accordance with their abilities.  The roles mirror the value and contributions of project management.

Figure 4-2:  Project Manager Interaction depicts the typical outlooks (in terms of a time range) of strategic, middle, and operations management.  The project manager should consider these time ranges to ensure more meaningful interactions with the three management groups.

Project
Manager
Interaction
Areas

Strategic Management
(3 to 5 Years View)

Middle Management
(1 to 3 Years View)

Operations Management
(Today to 1 Year View)

**Figure 4-2: Project Manager Interaction**

### 4.2.2. The Project

Project managers are assigned by the performing organization.  They must lead the team responsible for realizing the goals of the project and satisfying stakeholder needs, set the direction of the project, and initiate the **vision of project success**.  They must also work to **balance project constraints** against available resources and achieve consensus regarding project decisions and actions among sponsors, team members, and stakeholders with competing goals.

The most successful project managers are **excellent communicators** and have superb relationship skills.  They exhibit the ability to communicate with a broad range of personalities and roles verbally, nonverbally, and in writing.  Their written communications are succinct, relevant, and unambiguous.  They develop, evolve, and follow the communication schedule predictably, communicating in alignment with the stakeholders' preferences and integrating feedback channels.  Their relationship skills involve the nurturing and expansive networking of people within their sphere of influence:  both formal (organizational reporting structures) and informal (individuals, including other project managers, subject matter experts, and important leaders).