




# RICARDO VARGAS EXPLAINS THE PMBOK® GUIDE 7<sup>TH</sup> EDITION


## PRINCIPLES

	<h1>STEWARDSHIP</h1>	
<h2>Be a diligent, respectful, and caring steward</h2>		
<h3>DESCRIPTION</h3> <p>You need to care about the project and feel <b>responsible</b> and <b>committed</b> to delivering value through the project. You should oversee the project with the same level of care you use in your personal life.</p>	<h3>KEYWORDS</h3> <ul style="list-style-type: none"><li>- Care</li><li>- Honesty</li><li>- Trustworthiness</li><li>- Compliance</li></ul>	
<h3>COMMENTS</h3> <ul style="list-style-type: none"><li>» The PMI's <b>Code of Ethics</b> is related to this principle, but it is not the same thing.</li><li>» It demonstrates your <b>duty of care</b> and your behavior towards the project's interest.</li><li>» It is about being <b>transparent</b>, <b>avoiding conflicts of interest</b>, and following the <b>law</b>.</li></ul>		

		<h1>TEAM</h1>
<h2>Create a collaborative project team environment</h2>		
<b>DESCRIPTION</b>		<b>KEYWORDS</b>
It is <b>impossible</b> to deliver sustainable outcomes without a team that <b>collaborates</b> and <b>works together</b> towards the same objective. Team members must use their specific skills with the aim to fulfill the needs of the team and the goals of the project.	<ul style="list-style-type: none"><li>- Collaboration</li><li>- Teamwork</li><li>- Culture</li><li>- Roles &amp; Responsibilities</li></ul>	
<b>COMMENTS</b>		
<ul style="list-style-type: none"><li>» Team collaboration does not necessarily mean <b>friendship</b>.</li><li>» Organizational <b>culture affects</b> the way teams work together.</li><li>» It is more efficient and effective to work as a <b>team</b> than <b>alone</b>.</li></ul>		

STAKEHOLDERS	
	Effectively engage with stakeholders
<b>DESCRIPTION</b> Stakeholders can <b>directly</b> and <b>indirectly</b> influence the project. If you do not engage with them, you may <b>create threats</b> and <b>miss opportunities</b> to optimize the outcomes you should focus on to deliver value.	<b>KEYWORDS</b> <ul style="list-style-type: none"><li>- Engagement</li><li>- Individuals</li><li>- Groups</li><li>- Organizations</li></ul>
<b>COMMENTS</b> <ul style="list-style-type: none"><li>» They can <b>support</b> or <b>oppose</b> the project work, and their opinion can change over time.</li><li>» Stakeholders can be <b>internal</b> or <b>external</b> to the organization.</li><li>» They can <b>come</b> and <b>go</b> during the project life cycle.</li></ul>	

VALUE		
Focus on value		
DESCRIPTION	Successful projects are all about delivering value. It goes <b>above and beyond a simple delivery</b> . Benefits are realized when the target stakeholders perceive the <b>positive value of the outcomes</b> enabled by the deliverables.	KEYWORDS <ul style="list-style-type: none"><li>- Outcomes</li><li>- Success</li><li>- Business results</li><li>- Benefits</li></ul>
COMMENTS	» There is <b>no point in focusing on schedule and on budget</b> if you do not deliver value. » Value can be <b>realized during or after</b> the end of a project. » The project should <b>NOT</b> continue if it does not deliver the proposed outcome or value.	

	<h1>SYSTEMS THINKING</h1> <p>Recognize, evaluate, and respond to system interactions</p>
<p><b>DESCRIPTION</b></p> <p>Your project is not a bubble. It is a <b>"gear"</b> of a more extensive system that includes several other <b>interdependent agents</b>. It is your responsibility to make sure these interactions are considered and planned.</p>	<p><b>KEYWORDS</b></p> <ul style="list-style-type: none"><li>- Interdependency</li><li>- Systems of systems</li><li>- Integration</li><li>- Holistic view</li></ul>
<p><b>COMMENTS</b></p> <ul style="list-style-type: none"><li>» It is essential to balance <b>internal</b> and <b>external</b> perspectives.</li><li>» <b>Systems may change over time</b> due to internal and external volatilities.</li><li>» Systems operate <b>beyond</b> the <b>project life cycle</b> and will continue afterward.</li></ul>	

LEADERSHIP		
Demonstrate leadership behaviors		
DESCRIPTION		KEYWORDS
<b>Projects</b> are <b>complex efforts</b> , and they need strong leadership to get the job done. Aspects like <b>motivation</b> , <b>focus</b> , <b>self-awareness</b> , and <b>facilitation</b> are critical to align the team and overcome the natural level of conflict that may arise.		- Motivation - Empowerment - Example - Influence
COMMENTS		
» <b>Anyone</b> in the team can demonstrate leadership skills. » Leadership is <b>different</b> from authority. » There is no single <b>universal</b> leadership style.		

## PRINCIPLES

- They are the foundation on how we should approach something.
- » They guide our behavior and actions.
  - » They are open, and we can apply them in different ways and contexts.
  - » They are interconnected.
  - » There is no specific order or ranking of principles.

## PRINCIPLES

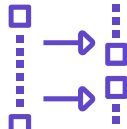
TAILORING		
Tailor based on context		
DESCRIPTION	Your approach cannot be <b>"one size fits all."</b> It must be <b>adapted</b> to fit the corresponding work, organization, and cultural aspects, aiming to increase benefits and maximize value.	KEYWORDS
		<ul style="list-style-type: none"><li>- Predictive (waterfall)</li><li>- Iterative (agile)</li><li>- Hybrid</li><li>- Swiss Army knife</li></ul>
COMMENTS		
<ul style="list-style-type: none"><li>» There is no <b>"best"</b> methodology.</li><li>» There is only a <b>"right"</b> methodology for a specific case.</li><li>» The delivery method can be a <b>mix</b> of different approaches and methods.</li></ul>		

QUALITY		
Build quality into processes and deliverables		
DESCRIPTION	Quality is the way the deliverables <b>connect to the objectives</b> and the <b>value chain</b> . Your probability of providing business benefits is dramatically reduced if you cannot produce project deliverables that meet the requirements.	KEYWORDS <ul style="list-style-type: none"><li>- Satisfy needs</li><li>- No defects</li><li>- Fit for purpose</li><li>- Conformity</li></ul>
COMMENTS	<ul style="list-style-type: none"><li>» Quality is all about <b>fulfilling the requirements</b>.</li><li>» Quality <b>can</b> be measured.</li><li>» Focus on <b>detection</b> and <b>prevention</b> of errors and mistakes.</li></ul>	

COMPLEXITY		
Navigate complexity		
DESCRIPTION		KEYWORDS
You must look for ways of accepting the complexity of the environment you are in. Volatility, Uncertainty, Complexity, and Ambiguity (VUCA) are parts of any project. <b>Shift your focus from avoiding complexity to assessing and reacting when needed.</b>		- VUCA - Ambiguity - Uncertainty - Volatility
COMMENTS		
» Complexity arises from different factors, and most of them are <b>outside of our control</b> . » It can be <b>increased</b> or <b>decreased</b> at any point of the project. » <b>Indicators</b> and <b>triggers</b> are critical tools to navigate complexity.		

RISK		
Optimize risk responses		
DESCRIPTION		KEYWORDS
Risks are part of every single project. You need to <b>proactively assess the project exposure</b> and <b>respond</b> effectively to potential threats and opportunities that may affect the project's ability to deliver value.		<ul style="list-style-type: none"><li>- Threats</li><li>- Opportunities</li><li>- Risk tolerance</li><li>- Risk appetite</li></ul>
COMMENTS		
<ul style="list-style-type: none"><li>» Each organization has a <b>different tolerance</b> to risks, and this affects their actions.</li><li>» Probability and impact <b>change</b> over time.</li><li>» Risks can be inside or outside <b>your control</b>.</li></ul>		

ADAPTABILITY AND RESILIENCY		
Embrace adaptability and resiliency		
<b>DESCRIPTION</b> Your resilience will allow you to " <b>build back better</b> " after a setback. If you or your organization are not adaptable and resilient, it will be tough to accept change and recover from problems.	<b>KEYWORDS</b> <ul style="list-style-type: none"><li>- Recovery</li><li>- Adaptability</li><li>- Resilience</li><li>- Diversity</li></ul>	
<b>COMMENTS</b> <ul style="list-style-type: none"><li>» Resiliency is built by improving the <b>capacity of absorbing impact and recovering</b>.</li><li>» Adaptability increases by <b>focusing on the outcomes</b> and not on a specific delivery.</li><li>» <b>Team diversity improves</b> the capability of developing adaptability and resiliency.</li></ul>		

	<h1>CHANGE</h1> <p>Enable change to achieve the envisioned future state</p>
<p><b>DESCRIPTION</b></p> <p>Change is the only <b>permanent feature of any project</b>. You must act as a change agent and create the <b>conditions for others to adapt</b> to a rapid and evolving environment.</p>	<p><b>KEYWORDS</b></p> <ul style="list-style-type: none"><li>- Psychological safety</li><li>- Enablement</li><li>- Comprehensive</li><li>- Resistance</li></ul>
<p><b>COMMENTS</b></p> <ul style="list-style-type: none"><li>» Change is <b>NOT</b> necessarily a bad thing.</li><li>» Enabling change is the <b>opposite</b> of avoiding change.</li><li>» Keep the <b>desired outcomes</b> in mind when evaluating changes.</li></ul>	

## PERFORMANCE DOMAINS

- Group of related activities that are critical for the delivery of the outcomes.
- » There is no prescriptive sequence to execute these activities.
  - » They can be used with different delivery approaches (predictive, agile, hybrid).
  - » They are not processes.
  - » They are interactive, interdependent, and interrelated.

## PERFORMANCE DOMAINS

STAKEHOLDER		TEAM		DEVELOPMENT APPROACH AND LIFE CYCLE		PLANNING	
DESCRIPTION		DESCRIPTION		DESCRIPTION		DESCRIPTION	
Combines a set of activities related to stakeholders, including the engagement process to ensure that there are <b>productive working relationships with stakeholders</b> .		Contains activities that address the <b>responsibilities</b> associated with the work that must be done to deliver business value.		It is the domain where the delivery approach ( <b>predictive, iterative, hybrid</b> ) is selected, and the life cycle, phases, and cadence are defined.		Contains the activities associated with the required <b>coordination</b> and <b>organization</b> to produce the deliverables.	
COMMENTS		COMMENTS		COMMENTS		COMMENTS	
» Contains relevant elements of <b>communications</b> . » Includes activities to address <b>supporting</b> and <b>opposing</b> stakeholders. » <b>It is not about friendship</b> . It is about a productive relationship. » <b>Stakeholders change</b> during the project. » Not all stakeholders are the same. They have different <b>interests</b> and <b>influences</b> .		» Includes the <b>roles</b> and <b>responsibilities</b> within the team. » Team <b>culture</b> must be built, including norms and behaviors. » Very connected to the <b>leadership principle</b> . » Includes components of <b>emotional intelligence</b> , <b>critical thinking</b> and <b>motivation</b> . » Strong emphasis on <b>shared ownership</b> .		» A project may have a <b>single</b> deliverable or <b>multiple, periodic</b> or <b>continuous</b> deliverables. » <b>Predictive approach</b> is based on <b>defined requirements</b> . » <b>Iterative or adaptive approach</b> is useful when there is a <b>high level of uncertainty</b> . » <b>Hybrid approach</b> combines aspects of <b>both</b> predictive and iterative approaches. » <b>Many factors</b> affect the selection of your approach (risks, innovation, stability, funding).		» Strongly related to the <b>Development Approach</b> . » <b>Predictive planning</b> uses WBS and decomposition models to break down the scope. » <b>Iterative planning</b> uses the concept of <b>evaluating multiple options</b> until costs may exceed benefits. » Describes concepts of <b>estimating</b> , <b>scheduling</b> and <b>budgeting</b> using different approaches. » It has some aspects of the <b>planning process group</b> of the PMBOK® Guide 6th edition.	
PROJECT WORK		DELIVERY		MEASUREMENT		UNCERTAINTY	
DESCRIPTION		DESCRIPTION		DESCRIPTION		DESCRIPTION	
Addresses all activities related to the <b>actual work</b> like physical resources, contracting, managing change, and continuous learning capability.		Combines the activities and work associated with the project's delivery, including <b>requirements, quality, and change</b> .		Includes the activities that <b>measure project performance</b> to allow actions to be taken to ensure the desired results are achieved.		Assures that the project contains activities that address <b>risks, uncertainty, and VUCA</b> (volatility, uncertainty, complexity, and ambiguity) and its environment.	
COMMENTS		COMMENTS		COMMENTS		COMMENTS	
» Includes reviewing the project work using <b>lessons learned</b> , <b>retrospective</b> , and <b>lean methods</b> . » Actions related to reducing <b>work in progress (WIP)</b> take place in this domain. » Several <b>procurement</b> processes happen under the Project Work Domain, especially contracting activities. » Very closely connected to the <b>Tailoring</b> and <b>Change</b> principles. » It has some elements of the <b>executing process group</b> of the PMBOK® Guide 6th edition.		» Requirements can be clear in <b>predictive development</b> . » In the <b>adaptive approach</b> , requirements may only be clear at <b>later stages</b> . » Includes aspects of Cost of Quality (COQ) like <b>prevention</b> and <b>correction</b> . » <b>Stakeholder acceptance</b> and <b>satisfaction</b> is a key performance factor to evaluate deliverables. » <b>Fail fast, learn fast</b> approach can support the handling of <b>suboptimal outcomes</b> .		» It is impossible to evaluate results if you do <b>not measure them</b> . » Measurement goes <b>above and beyond reporting and data</b> . » Measurement is all about <b>conversations</b> and decisions using the data. » Covers <b>leading</b> and <b>lagging</b> indicators (KPI) and what is an effective metric. » Aspects of <b>Earned Value Analysis</b> , <b>dashboards</b> , <b>Kanban</b> and other visual ways of reporting are presented by this domain.		» Despite not being mentioned in the guide, the VUCA concept is a critical aspect of this domain. » Strongly connected to the <b>Systems Thinking</b> , <b>Complexity</b> and <b>Risk</b> principles. » <b>Early warning</b> and <b>environmental scanning</b> are relevant activities to address uncertainty. » The "Risk" knowledge area of the PMBOK® Guide 6th edition is closely related to this. » Uncertainty, as well as risks, are <b>not necessarily negative</b> . They can be opportunities.	

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**Explanatory Note:** This work does not replace the need to read the PMBOK® Guide and the Standards for Project Management. It is an educational material to help project managers and other professionals to understand the publication in an easier and direct way.

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