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| | | Rev: 01 Rev 01 – Oct 2016 |
| IACPE No 19, Jalan Bilal Mahmood 80100 Johor Bahru Malaysia | Managing Stakeholders and Communications CERTIFIED PRACTICING PROJECT MANAGER TRAINING MODULE | |

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INTRODUCTION

Scope

This Stakeholder and Communication Plan forms part of a comprehensive suite of management plans for the project management skill set. This plan identifies the key stakeholder groups and methods for engaging with them as well as individual members of the public. The plan is not prescriptive but provides a framework for engagement and the range of methods that may be employed.

While it is intended that a proactive approach to engagement and communication will be adopted, the plan will need to be responsive as the project progresses and tailored to the needs of situations and stakeholders. Specific targeted engagement and communication plans will be developed for milestones and events during the construction phase. The plan will be updated, with the necessary approval, throughout the course of the project to reflect changes associated with changes to the construction methodology and in response to stakeholder and community feedback.

About 80% of the time spent on managing stakeholders is not effective. In fact, poor stakeholder management and ineffectual communication are two of the key reasons why change often fails. Managing stakeholders effectively is not just about forward momentum, it is also about scale and helping to push and promote change in every corner of the organization.

Communication itself is a human endeavor, and the complex communication that may be necessary for managing stakeholder relationships within an organization or around its activities requires planning, monitoring and leadership. The team must apply analysis, skills and experience to succeed in communicating to engage stakeholders.

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General Design Considerations

Stakeholders are groups or individuals who supply critical resources, or place something they value at risk through their investment of funds, career or time in pursuit of the organization's business strategies or goals. Alternatively, stakeholders may be groups or individuals opposed to the organization or some aspect of its activities. A stakeholder has a stake in the activity. This stake may be:

- An interest in the outcome, an individual or group affected by the work or the outcome, whether direct or indirect;
- Rights (legal or moral);
- Ownership, such as intellectual property rights, or real property rights;
- Contribution in the form of knowledge (expertise or experience) or support (in the form of funds, human resources, or advocacy)

Stakeholder management and communication is critical to the successful completion of capital projects. Connecting with the right people and satisfying stakeholder demands throughout the planning and execution phases can significantly affect the perception of a project. Stakeholder management is a key aspect of the role. Ideally, it is a conscious, planned and focused activity associated with clear actions and outcomes, but more often than not, it is an unconscious and unplanned aspect of managing projects on a daily basis.

It is commonly acknowledged that about 80% of the time managing stakeholders is not effective. Stakeholder management and communication can be complex and time consuming. Stakeholder identification and management is a key skill for all project managers, program managers and executives.

Depending on the specific issues impacting the project (i.e. regulatory scrutiny, environmental concerns, local contracting opportunities, joint venture profitability) the successful management of stakeholder interest ensures that stakeholders:

- Have a voice.
- Participate in the management process.
- Contribute to the overall success of the project.

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A good communication process keeps stakeholders engaged and project teams motivated. Effective communication serves as the very bedrock of business. It can sway public opinion, give teams a sense of purpose, persuade executives to increase funding—and boost project success rates.

Organizations with effective and efficient communication methods are more likely to stay within scope, meet quality standards and deliver intended business benefits. Lack of effective communication dramatically increases the risk projects face and the likelihood that they will fall short. Ineffective communication is to blame for more than half of projects that fail to meet business goals. Effective communication doesn't just convey facts. It makes people understand the role they play in the project.

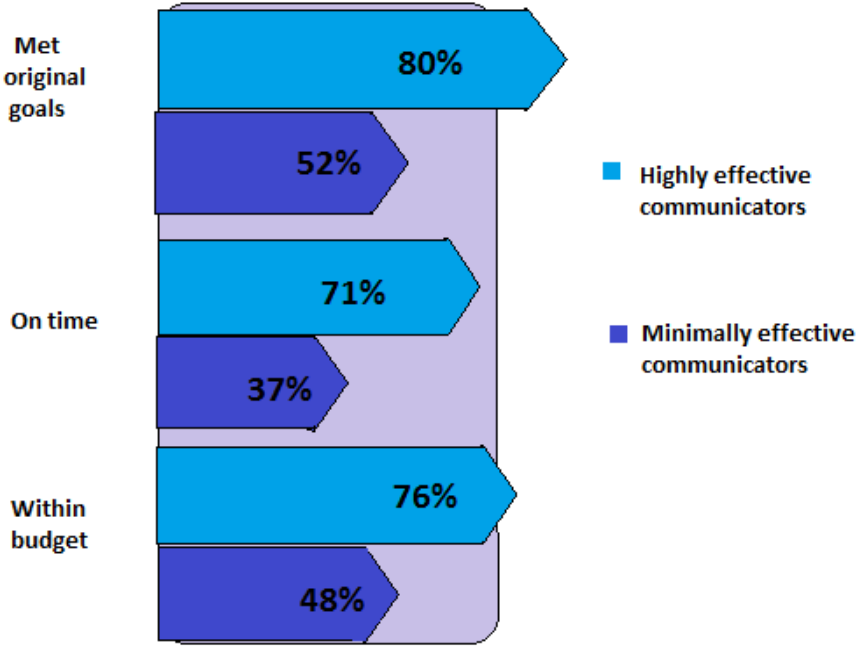


Figure 1: Different organization with effective communication

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To ensure project success, stakeholders should be identified early in the project. Their needs and expectations should be determined and those expectations managed over the course of the project. Stakeholders are often broadly grouped, for example 'policy-makers' might be identified as an important stakeholder group for a project, but there is likely to be much variation in the interests and motivations of different stakeholders in a grouping.

Such variation might be affected by factors such as the geographical scale at which they make decisions or operate, and resource availability. For this reason, it is important to recognize that not all stakeholders in one broad group are likely to have the same interests and motivations, and so the engagement levels may vary for different individuals or organizations in a group. Stakeholders on every project include the following individuals:

- The project manager, who has ultimate responsibility for ensuring project success;
- The project owner, who leads in getting the need for the project recognized and who has a professional stake in the project's success;
- The user, who is the person or organization using the product of the project;
- Non--user constituents that may be significantly impacted by the project's success;
- The project team members, who are responsible for performing the work on the project;
- Executive management and the funding organization.

Customers, both internal and external to the organization, are to be considered important stakeholders. Without input from the user community, projects are more likely to fail. Having user needs defined early as part of the stated project goals and directly traceable to the final solution increases the success factor for a given project. The management of stakeholder expectations is potentially difficult because of conflicting goals and expectations.

The expectations may require more resources than are currently available. Finding appropriate resolutions to these differences is a key to successful project management. One common mistake organizations make is in not engaging all stakeholders early in the project life cycle. Early engagement is critical to determine project feasibility and properly set project scope.

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The communication strategy is part of the Project Initiation Document. It is created during Project Start-up and completed during project delivery. During project delivery, the project manager is responsible for ensuring that communications are produced per the plan, updating it as necessary as stakeholders (and their needs) may change while the work progresses. Where a project is part of a program, the communication strategy must also define how information is to be fed into the program.

Good communication is crucial to the success of projects and programs, and serves several purposes including:

- identifying and alerting those likely to be affected by the project
- managing expectations of what will be delivered (and what will be excluded)
- advising on progress
- promoting the benefits of the project's objectives
- managing negative perceptions of the project
- providing a route for directing questions or feedback
- ensuring information is circulated to the right people at the right time – and in the appropriate format

The objectives of developing a project/program stakeholder management and communication strategy are to:

- identify all stakeholders and ensure that their specific interests and influence are understood and recorded
- keep stakeholders informed of progress before, during and after implementation or delivery of the project/program
- inform stakeholders how to contribute to consultation and decision-making and understand their responsibilities regarding the business change that the project will deliver
- gain commitment from stakeholders, thus ensuring the long-term success of the changes
- demonstrate a commitment to meeting the requirements of those sponsoring the program/project

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- ensure all those responsible for communication have a shared understanding of the appropriate standards and for the need to provide appropriate tools to engage stakeholders
- establish the information requirements associated with each of the decision-making processes
- define the communication content, recipient(s), format, frequency and any approvals required for all external communications and establish who will be responsible for ensuring the communication takes place
- establish the procedures required to produce and distribute information so that there is consistency in what is produced and disseminated

When a project is managed with a full understanding of what the end-users want, need and think, it will deliver more satisfactory and sustainable outcomes. To achieve this it is vital to communicate with, consult and involve all stakeholders appropriately. It is important to differentiate the three elements of stakeholder engagement and communication and understand their different roles:

- communicating the project
- communicating the project outcomes
- consultation and involvement

i. Communicating the project

The Communication Management and Stakeholder Engagement Plan address the communications process which should be embedded throughout the entire project. The Plan is part of the Project Initiation Document and describes how information will be shared throughout the project organization and with the project's stakeholders. Communication is the giving, receiving, processing and interpretation of information, and effective communication is fundamental to successful project management.

Stakeholder analysis is a key activity in segmenting the various audiences and deciding the frequency, method and content of the messages that need to be delivered which, in turn, informs the communications schedule. Understanding the scope of the project will help determine who the stakeholders are, and an understanding of their interests and influence is crucial for successful project delivery. Understanding the scope of the project

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will help determine who the stakeholders are, and an understanding of their interests and influence is crucial for successful project delivery.

The communication strategy defines how communications will be established and managed throughout the project and is informed by a stakeholder map which:

- identifies stakeholders and assesses their interests and potential influences on the project
- defines when and what information will be communicated, to ensure all stakeholders
- receive the appropriate level and frequency of information
- sets out how the project will engage with different stakeholders and stakeholder groups
- records how consultation and feedback will contribute to decision making
- determines the format, frequency and content of communications

ii. Communicating the project outcomes

Communicating the outcome or consequence of the project upon completion is distinct from communicating during the project. It is important that the project planning process considers the point at which post-project communications need to happen and who will take responsibility for the planning and implementation. The stakeholders involved at this point may well be different from those involved during the project and the key messages will no longer be focused on the progress of the project.

iii. Consultation and involvement

People use many different terms to describe activities designed to enhance citizens' roles in local decision making: consultation, involvement, research, community engagement. Sometimes these different terms get used to describe the same thing, although there are real differences in meaning:

- Researching needs, priorities and attitudes; for example: "here's what we have found out from feedback or survey results"
- Consulting communities about actions/decisions: "tell us what you think and we will take that into account when we make the decision"

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- Involving communities in shaping plans: “we want to explore options and decide together”
- Acting together: “we want to carry out joint decisions together”
- Empowering communities to take responsibility for making decisions or delivering services with our support: “we can help you achieve what you want”.

it is important for everyone involved in projects to be aware of some basic issues around planning consultation and engagement:

- plan consultation and involvement as early as possible in order to involve the right stakeholders at a time when it is meaningful to do so
- decide who the stakeholders are - avoid simply placing ‘residents’ or ‘citizens’ all together as one group; consider the different age groups, ethnicities, faiths etc.
- find out what is already known about the issues – it may not be necessary to do all the consultation originally planned if the information already exists
- involve expert support for consultation and involvement – there are a growing number of expert officers both at service level and in the corporate communications team
- decide what there is to consult about – if there are no options on the table, inform stakeholders but don’t consult if they can’t affect design or delivery
- decide which consultation and involvement tools will best engage with these stakeholders - one size usually does not fit all
- coordinate your consultation and involvement work - join up with other consultations and involvement wherever you can for efficiency and to avoid ‘fatigue’ in communities that get asked the same things over again
- to support better planning and collaboration, the Council has one central place to register all consultation and involvement activity
- always feedback the outcomes to those that took part. It is good practice, courteous and encourages future involvement

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Stakeholder Circle

Stakeholder management plans operate at many different levels across any organization, from peak executive bodies to individual streams of projects. The stakeholder management cycle, which leads to the identification of stakeholders and the development of a stakeholder management plan, can be applied at each level in the same manner.

The Stakeholder Circle is a five-step methodology that provides a flexible but structured approach to understanding and managing relationships within and around the activity. The Stakeholder Circle methodology is based on the concept that success of an organization’s activities to achieve its business strategies and objectives (often projects) depends on the engagement and involvement of the stakeholder community.

Figure 2 shows the relationships between the activity and its stakeholders. All decisions or understanding of the relationships are made from the perspective of the manager of the activity. Surrounding the activity itself is the team; often overlooked in many stakeholder engagement processes, just as it appeared to be by management. Surrounding the team is the community of stakeholders that has been identified as being important to the success of the activity now. The outermost circle references potential stakeholders: those who may, or will, be important to the success of the work at a later stage.

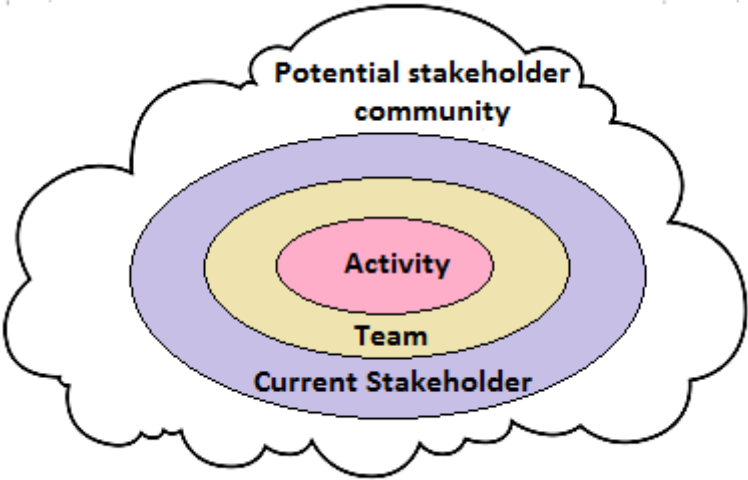


Figure 2: Stakeholder circle

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Stakeholder relationship management is complex and cannot be reduced to formula. Each person is unique and the relationships between people reflect that uniqueness and complexity. The Stakeholder Circle enables the team to accumulate information necessary for the engagement of its stakeholders. It consists of five steps:

Step 1: identification of all stakeholders.

The output of this step will be a list of all stakeholders that fit the definition of stakeholder. Identify consists of three activities:

1. Developing a list of stakeholders;
2. Identifying mutuality:
 - a. How each stakeholder is important to the work of the project; and
 - b. What each stakeholder expects from success (or failure) of the project, or its outcomes;
3. Categorize: document each stakeholder's:
 - a. Influence Category: these are upwards, downwards, outwards, and side-wards,
 - b. Relationship to the organization - whether they are internal to the organization or external.

Step 2: prioritization to determine who is important;

The approach adopted in the Stakeholder Circle methodology attempts to provide consistency in decision making about stakeholders. It does this through a structured decision-making process where team members agree on and rate the characteristics of stakeholders to assess their relative importance. It can be providing with ranking or rating that based on three aspects:

- **Power:** the power an individual or group may have to permanently change or stop the project or other work; it is essential only to understand the extent to which the stakeholder has power over the continuation of the work itself, the extent to which he or she must be consulted, or at the lowest level, that he or she has no power at all.
- **Proximity:** the degree of involvement that the individual or group has in the work of the team; Its contribution is the acknowledgement of the importance of regular, close and often face-to-face relationships in influencing the outcomes of the work.

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- Urgency: the importance of the work or its outcomes, whether positive or negative, to certain stakeholders (their stake), and how prepared they are to act to achieve these outcomes (stake). Two conditions that may contribute to the notion of urgency:
 1. Time sensitivity: work that must be completed in a fixed time;
 2. Criticality: an individual or group feels strongly enough about an issue to act, such as environmental or heritage protection activists.

In the Stakeholder Circle, urgency is rated through analysis of two sub-categories: the value that a stakeholder places on an outcome of the work, and the action that he or she is prepared to take because of this stake. The inclusion of urgency in the prioritization ratings balances the potential distortion of an organizational culture that identifies stakeholders with a high level of hierarchical power as most important. If power and proximity are the only measures, stakeholders such as the 'lone powerless voice' who can cause significant damage to successful outcomes if ignored, will not be acknowledged.

Step 3: visualization (mapping) to understand the overall stakeholder community;
The objective of every stakeholder mapping process is to:

- Develop a useful list of current stakeholders;
- Assess some of their key characteristics;
- Present data to assist the team's planning for engaging these stakeholders;
- Reduce subjectivity;
- Make the assessment process transparent;
- Make the complex data collected about the stakeholders easy to understand;
- Provide a sound basis for analysis and discussion.

Step 4: engagement through effective communications;

The team must understand the expectations of all stakeholders and how those expectations can be managed to maintain supportive relationships and to mitigate the consequences of unsupportive stakeholders.

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Step 5: monitoring the effect of the engagement.

The process of monitoring the effectiveness of communication involves:

1. Review of the stakeholder community to ensure that the membership is current – the right stakeholders for the current phase or time;
2. Review of the stakeholder engagement profile.

Communications planning

Once the stakeholder mapping is complete, it is a good idea about how each stakeholder is feeling about the change project. This information is used to inform the communications plan – specifically who should be prioritized in the communications. The structure of the communications plan will coordinate all elements of the communications and ensure that relevant, accurate, consistent information is provided to the right people always. The communications plan should subsequently promote acceptance, ownership, improve morale and support the implementation of a change.

A communications plan is created to coordinate all elements of communications to better inform stakeholders within a project. It is created by taking existing information about the stakeholders, the communications objectives and organizing the information into a work-plan like document. The communications plan maps six elements of communication:

- The audience of the communication
- The purpose of the communication
- Who should communicate the information
- What the message should include
- What channel will be used for the communication
- How the communication method will be reviewed

Communications planning involves determining the information and communications needs of the stakeholders: who needs what information, when will they need it, and how will it be given to them. While all projects share the need to communicate project information, the informational needs and the methods of distribution vary widely. Identifying the informational needs of the stakeholders and determining a suitable means of meeting those needs is an important factor for project success. Most communications planning is done as part of the earliest project phases. However, the results of this

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process should be reviewed regularly throughout the project and revised as needed to ensure continued applicability (Duncan, 1996).

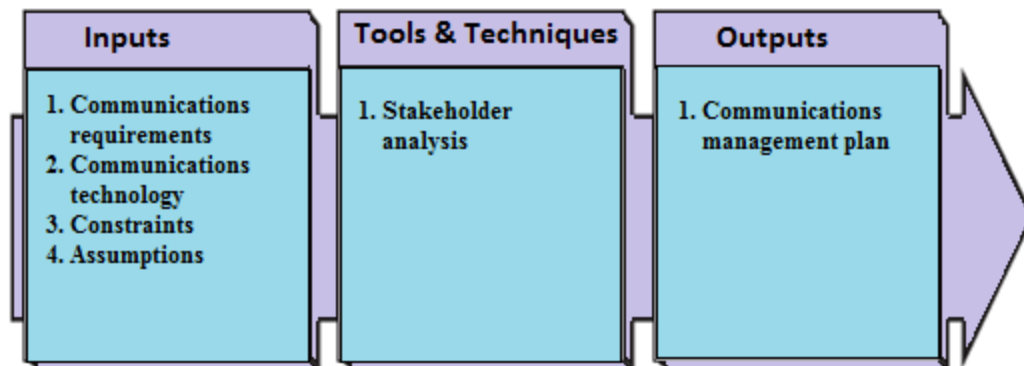


Figure 3: Communication Planning

1. Communications requirements. Communications requirements are the sum of the information requirements of the project stakeholders. Information typically required to determine project communications requirements includes:
 - Project organization and stakeholder responsibility relationships.
 - Disciplines, departments, and specialties involved in the project.
 - Logistics of how many individuals will be involved with the project and at which locations.
 - External information needs (e.g., communicating with the media).

2. Communications technology. Communications technology factors which may affect the project include:
 - The immediacy of the need for information—is project success dependent upon having frequently updated information available on a moment's notice, or would regularly issued written reports suffice?
 - The availability of technology—are the systems that are already in place appropriate, or do project needs warrant change?

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- The expected project staffing—are the communications systems proposed compatible with the experience and expertise of the project participants, or will extensive training and learning be required?
 - The length of the project—is the available technology likely to change before the project is over in a manner that would warrant adopting the newer technology?
3. Constraints. Constraints are factors that will limit the project management team's options. For example, if substantial project resources will be procured, more consideration will need to be given to handling contract information.
 4. Assumptions. Assumptions are factors that, for planning purposes, will be true, real, or certain. Assumptions generally involve a degree of risk.
 5. Stakeholder analysis. The information needs of the various stakeholders should be analyzed to develop a methodical and logical view of their information needs and sources to meet those needs. The stakeholder's analysis is designed to help the Project Plan analyze internal and external stakeholder needs by gathering the following information from each stakeholder:
 - Goals for the project. What is each stakeholder's desired outcome for the project? The project manager should ensure at the start that there is a consistent vision for the project.
 - Preferred methods of communication. Project team members will use this information to meet individual communication needs. If the team cannot reasonably communicate through each stakeholder's preferred medium, the team needs to negotiate a method to ensure that each stakeholder receives and understands the project communication.
 - Preferred method for recognizing performance of the team, within the constraints of what is achievable. The Project Plan uses this information to plan appropriate celebrations at the completion of each project component.
 6. Communications management plan. A communications management plan is a document which provides:
 - A collection and filing structure which details what methods will be used to gather and store various types of information. Procedures should also cover collecting and disseminating updates and corrections to previously distributed material.
 - A distribution structure which details to whom information (status reports, data, schedule, technical documentation, etc.) will flow, and what methods (written reports, meetings, etc.) will be used to distribute various types of information. This

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structure must be compatible with the responsibilities and reporting relationships described by the project organization chart.

- A description of the information to be distributed, including format, content, level of detail, and conventions/definitions to be used.
- Production schedules showing when each type of communication will be produced.
- Methods for accessing information between scheduled communications.
- A method for updating and refining the communications management plan as the project progresses and develops.

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DEFINITIONS

Communication - In general terms, is the process of creating understanding between a sender and a receiver. For communication to occur, the message received must match the message sent. The sender should ensure this match with feedback from the receiver

Communications Management - The process by which formal communications messages are identified, created, reviewed and communicated within a project. The proper organization and control of information transmitted by whatever means to satisfy the needs of the project. It includes the processes of transmitting, filtering, receiving, and interpreting or understanding information, using skills appropriate to the application in the project environment

Communication Management and Stakeholder Engagement Plan (CMSE Plan) - part of the Project Initiation Document (PID) and describes how information will be shared throughout the project organization and with the project's stakeholders

Communications Planning - The process of identifying the type and regularity of information to be provided to all project stakeholders to keep them informed of the progress of the project

Communication strategy- how communications will be established and managed throughout the project and is informed by a stakeholder map

Conflict Management -Prescribed method of resolving problems arising during the course of a project.

Filing system - a set of agreed-upon folder and file naming conventions used to classify project documents to make them easier to find. It is, essentially, a numbering scheme used to identify different types of documents and the folders where they are stored

Milestone - A significant event in the project, usually completion of a major deliverable.

Project - A unique endeavor to produce a set of deliverables within clearly specified time, cost and quality constraints

Project Communication -the exchange of project-specific information with the emphasis on creating understanding between the sender and the receiver.

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Project Communications Management - A subset of project management that includes the processes required to ensure proper collection and dissemination of project information. It consists of communications planning, information distribution, performance reporting, and administrative closure.

Project Management - The application of knowledge, skills, tools, and techniques to project activities in order to meet or exceed stakeholder needs and expectations from a project.

Project Manager - The individual appointed with responsibility for managing the project. Acts as the customer's single point of contact for services delivered within the scope of a project. Controls planning and execution of the project's scope of activities and resources toward meeting established cost, timetable, and quality goals.

Project Milestone - An event used to measure the progress of a project. Signifies the start or completion of a major project deliverable

Project Plan - A document which lists the phases, activities, tasks, timeframes and resources required to complete the project. A formal, approved document used to guide both project execution and project control. The primary uses of the project plan are to document planning assumptions and decisions, to facilitate communication among stakeholders, and to document approved scope, cost, and schedule baselines. A project plan may be summary or detailed.

Project Team - A collation of people who report to the Project Manager

Proximity contribution- the acknowledgement of the importance of regular, close and often face-to-face relationships in influencing the outcomes of the work

Quality Management - The process by which the quality of the deliverables and management processes is assured and controlled for the project, using Quality Assurance and Quality Control techniques

Quality Planning - The process of identifying the approach taken to ensure the quality of the deliverables produced by the project and of the management processes undertaken. This includes a list of the quality criteria and standards to be achieved as well as the Quality Assurance and Quality Control techniques to be undertaken

Resource Breakdown Structure- a standardized, hierarchical list of roles that is used to produce a project deliverable. Project team members use the RBS to determine what

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roles are needed to produce project-specific WBS elements and to identify who needs to receive certain communication products

Scope management -the process of approving designs, directing change orders, approving change order requests, reviewing submittals, responding to requests for information etc.

Stakeholders - Individuals and organizations who are actively involved in the project, or whose interests may be positively or negatively affected as a result of project execution or successful project completion

Stakeholder analysis - a key activity in segmenting the various audiences and deciding the frequency, method and content of the messages that need to be delivered which, in turn, informs the communications schedule.

Stakeholder Circle- a five step methodology that provides a flexible but structured approach to understanding and managing relationships within and around the activity

Stakeholder engagement- about building and maintaining constructive relationships over time. It is an ongoing process between a company and its project stakeholders that extends throughout the life of the project and encompasses a range of activities and approaches, from information sharing and consultation, to participation, negotiation, and partnerships

Work Breakdown Structure (WBS)- A deliverable-oriented grouping of project elements, which organizes and defines the total scope of the project. Each descending level represents an increasingly detailed definition of a project component. Project components may be products or services.