



Certified Project Master (CPM)

Project Review & Oral Defence
Assessment Guidelines





A **Certified Project Master (CPM)** is a project leader and innovator. They have been independently assessed against a broad range of project management competencies, and can apply a suite of specialised technical and managerial skills to initiate, plan, execute and evaluate their own project work and the work of others.

Project Review & Oral Defence Guidelines

In order to demonstrate their competence as a Project Manager, CPM candidates are required to identify a complex public or private project that has recently completed and conduct a comprehensive review of its performance.

In order to meet the minimum threshold of complexity, the project you review must involve:

- ☞ A comprehensive and multi-faceted project plan
- ☞ A formal internal or external communications strategy
- ☞ A dedicated and diverse project budget
- ☞ Multiple administrative components
- ☞ Multiple operational components
- ☞ A wide range of stakeholders
- ☞ A project operations team

It is an essential requirement of this activity that you are a 'stranger' to the project. In other words, you cannot have had any of the following, active roles in the project you review:

- ☞ Project sponsor
- ☞ Steering committee member
- ☞ Project manager
- ☞ Project team member
- ☞ Project client

Part 1

The final output will take the form of a hypothetical consultant's report commissioned by the Board of Directors of the performing organisation. The report will be aimed at recommending improvements for the firm's performance of future projects. It is **not** a (product) review of the deliverable created by the project. In addition to common requirements for business writing, the Review should include the following major elements:

- ☞ An executive summary
- ☞ An overview of the project reviewed
- ☞ A discussion of the review methodology
- ☞ Critical analysis of:
 - Project initiation
 - Project planning
 - Project delivery
 - Project handover
- ☞ A conclusion that is linked to your previous discussion
- ☞ Clearly articulated and supported (SMART) recommendations
- ☞ Appendices, including the Business Case, Project Plan, sample Status Reports and other relevant and referenced project documents

At a minimum, you would be expected to conduct one-on-one interviews with the project manager, project sponsor and a client representative. Other project stakeholders should also be consulted. This can be done using a variety of methods, including interviews, workshops and surveys.

For assessment purposes, the Review is to be **at least 2,000 words** in length. The word count does not include footnotes, references and/or appendices. The executive summary must not be more than 10% of the overall word count.

Part 2

You will then be required to make a **30-minute Oral Defence** of your Project Review to complete this assessment activity. You will be contacted directly to schedule your defence once your written report has been assessed.

This Defence simulates a Board level interrogation of your Review conclusions and its recommendations – it is not an oral presentation of your findings (eg PowerPoint). You need to be familiar with larger issues, such as the project management frameworks, theories and best practice; more importantly, you need to have a deep understanding of the project you have reviewed and the major issues encountered.

1

Identify a project

One commonly expressed concern is that people do not have access to a sufficiently complex project for review, or a project that they are a 'stranger' to. In this instance, we recommend a number of alternatives:

- 🌀 Talk to your employer – there may be a number of projects suitable for review outside your immediate department. You might also be able to 'swap' a project with a fellow candidate.
- 🌀 Contact the local chapter of your relevant industry association – for example, if you are a software engineer, you could connect with other software engineers and have them suggest suitable projects for review.
- 🌀 Consider your social networks – are you a member of a sporting organisation or other community group? Do they have any recently completed projects? They may value your new-found expertise!
- 🌀 Ask a family member or friend – do they have access to suitable projects within their employer, industry or social networks?
- 🌀 Chase your dream – is there a public festival or event you've always wanted to be involved in? Is there a new career you'd like to pursue? Use your review as the opportunity to make new contacts and create new networks that might literally be life-changing!

We have found that a surprising number of people out there are receptive to the idea of having their projects externally reviewed for both academic and practical purposes. It is nonetheless important that you present yourself professionally, are fully prepared, and ready to answer any questions they might have about the process.

Therefore when making your introduction, either in person or via a letter, you should be able to fully explain:

- Who you are
- What you are doing
- Why you are doing it
- The benefit to them (both as an individual and an organisation)
- How the review process will work
- What you need from them
- When you need it
- How much it will cost
- How long it will take
- What they can expect at the end of the process

You should also be willing to sign a **non-disclosure agreement (NDA)** to protect any information learned in the course of your review that might be commercially sensitive. As part of your terms and conditions of enrolment, IPM enters into a binding NDA with you (the candidate), however some review sponsors may ask you to sign one directly with them.

As always, please ensure you fully read and understand what you are agreeing to in the NDA. Also ensure that the participating organisation fully understands that your final report will be shared with IPM for assessment purposes only, and that we will treat the data and findings you share with us in the strictest confidence (as per our NDA with you, which is included in the terms and conditions of your enrolment).

As a rule, we do not directly enter into NDAs with your review partners.

2

Prepare a plan

You can and ought to treat your review as a project in its own right. At this point you should:

- Define the terms of reference for your review: if you are using a report template, then your outputs are predefined, but what are your objectives and intended outcomes?
- List the project documents and assets you will need to complete the review
- Identify the key stakeholders and your engagement strategy
- Prepare a baseline review WBS and schedule – is a budget required?
- Consider how you will manage any risks (for example, what if certain documents / stakeholders are unavailable)

Although this plan is not assessed in its own right, as you are no doubt aware the effort you invest at this point will be repaid many times the further you get into the review itself!

3

Gather data

There are two (2) stages to data collection; however, they are not necessarily consecutive. The first stage involves gathering and reviewing all the relevant project planning documentation, including (but not necessarily limited to) the baseline and subsequent versions of the project:

- Business case
- Project charter
- Scope (WBS)
- Schedule
- Budget
- Stakeholder register
- Communications plan
- Procurement plan
- Risk register
- Human resource plan
- Finance plan

You should also review any and all project:

- Status reports
- Meeting agendas & meetings
- Change requests
- Issues logs
- Change logs
- General correspondence

From this data, you will begin to get a sense of what the project did well, and where the performing organisation may have opportunities to improve the future delivery of like projects. You might also draw important conclusions from the poor recordkeeping within (or even absence of) any or all of these documents.

These first impressions should then inform and guide your key stakeholder interviews and other primary data collection (stage two). As you are also likely to discover more relevant documents as part of this process, you should continually update you secondary (document) sources and the relationships that exist therein.

4

Analyse & report

Data analysis is the process of converting all the fragments of *information* you have collected into reliable, actionable *intelligence*.

Unfortunately, the amount of data you have likely generated could answer an incredible number of questions – you could spend the rest of your life trying to analyse all of that information! That is why it is important to go back to the original questions that you are trying to answer.

At the highest level, these questions can be found in your terms of reference; drilling down they may be included in your pre-defined report template. Beyond that, look at other ideas and themes that have emerged from your data (surprises), and consider them in terms of how they relate to your questions and their potential implications for the performing organisation.

You should always be looking for multiple points of evidence for each of your conclusions, all of which will lead to recommendations – the entire purpose of your review.

Using the project review template

Although you may use any report format, a Project Review template appropriate to this assessment task can be downloaded from <http://ipm.edu.au/resources>. Ensure the blue guidance text is deleted – it cannot be included in your word count!

Minimum word counts for each section are suggested below; however, they are presented as a rough **guide**, and not intended to be prescriptive. For example, not all the items in *Section 5 – Lessons Learned* may actually reveal lessons to learn! You are encouraged here to use your expert judgment in selecting how much detail to respond with at each criterion.

EXECUTIVE SUMMARY	<i>not included in word count...</i>	200 words
1 PROJECT OVERVIEW		
1.1 Project description		50 words
1.2 Intended outcomes		100 words
1.3 Strategic objectives		50 words
2 REVIEW METHODOLOGY		
2.1 Terms of reference		50 words
2.2 Primary sources		100 words
2.3 Secondary sources		50 words
2.4 Assumptions and constraints		50 words

3	PROJECT PERFORMANCE	
3.1	Performance against baseline plans	
3.1.1	Performance against baseline scope	50 words
3.1.2	Performance against baseline schedule	50 words
3.1.3	Performance against baseline budget	50 words
3.2	Benefits delivered	100 words
3.3	Benefits yet to be realised	50 words
3.4	Unplanned benefits.....	50 words
3.5	Changes.....	100 words
4	OPEN ACTIONS	
4.1	Open project issues.....	25 words
4.2	Residual risks.....	25 words
4.3	Handover/training needs.....	25 words
4.4	Other required activities.....	25 words
5	LESSONS LEARNED	600 words
5.1	Stakeholder identification and communication	
5.2	Business case development	
5.3	Scope definition and management	
5.4	Schedule development and control	
5.5	Cost estimating and control	
5.6	Risk identification, prioritisation and treatment	
5.7	Human resource availability and performance	
5.8	Quality planning and control	
5.9	Procurement / contract management	
5.10	Project governance and change control	
5.11	Project delivery and handover	
5.12	Other lessons learned	
6	PROJECT MANAGEMENT TEMPLATES, TOOLS AND ASSETS	100 words
7	CONCLUSION.....	50 words
8	RECOMMENDATIONS.....	250 words
9	APPENDICES	<i>Not included in word count</i>

This section is all about critical analysis. For some topics, you might simply acknowledge that there were no major issues or lessons to be learned – for others, you may present several hundred words of analysis. Where you place your emphasis depends on the specific contingencies of the project you are reviewing.

Total words: 2,000

Appendices

The following documents relevant to the project you have reviewed should be appended or linked to your report:

- 📄 Business case
- 📄 Project charter
- 📄 Scope (WBS)
- 📄 Schedule
- 📄 Budget
- 📄 Stakeholder register
- 📄 Communications plan
- 📄 Procurement plan
- 📄 Risk register
- 📄 Human resource plan
- 📄 Finance plan
- 📄 Issues register

Relevant samples of the following documents should also be appended:

- 📄 Status reports
- 📄 Meeting agendas & meetings
- 📄 Change requests
- 📄 Issues logs
- 📄 Change logs
- 📄 General correspondence

If any of these documents were not used in the project, ensure you discuss the rationale for and impacts of these omissions in your report.

5

Oral defence

You will be required to make a 30-minute Oral Defence of your Project Review to complete this assessment activity. You will be contacted directly to schedule your defence once your written report has been assessed.

This Defence simulates a Board level interrogation of your Review conclusions and its recommendations – it is not an oral presentation of your findings (eg PowerPoint). You need to be familiar with larger issues, such as the project management frameworks, theories and best practice; more importantly, you need to have a deep understanding of the project you have reviewed and the major issues encountered.

As most defences are conducted via Skype, you should have with you important materials for easy reference in the course of your defence; these may include key project documents, stakeholder interview notes, and the like.

As you will see from the assessment criteria (below), your defence is evaluated in terms of content and clarity, as well as style. Don't speak too fast and don't read from notes. Be prepared to clarify or

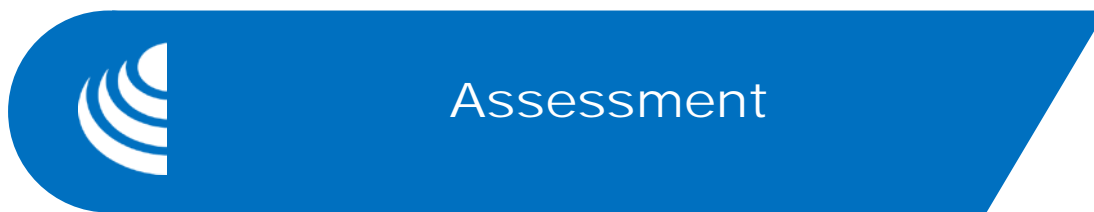
elaborate on your assumptions, theoretical positions, methods, and conclusions. Often an examiner plays the devil's advocate to see how well you can think on your feet and defend yourself.

Don't rush your answers. It is perfectly acceptable to think for a couple of seconds, or ask if you are on the right track. If you are not clear about the question you are entitled to ask for clarification.

Try to be concise and to the point, but at the same time demonstrate that you have a good grasp of the complex issues involved. In other words, do not give superficial answers, but at the same time, do not try and present an entire PhD-level theory of project management in each response.

Importantly, you should put up a good defence without being defensive. A good defence means that you can provide strong logical arguments and empirically support or defend your position or recommendations. However, don't become hostile if the examiner is critical of your work. If they are able to point out some real flaws or weaknesses in your review, accept their criticisms with humility, and indicate how you might learn from this for the future.

Note that this is an essential real world skill, and may be directly assessed!



Assessment Integrity

Academic misconduct includes cheating, plagiarism, allowing another candidate to copy work for an assignment or an examination, and any other conduct by which a candidate:

- 🌀 seeks to gain, for themselves or for any other person, any academic advantage or advancement to which they or that other person are not entitled, or
- 🌀 improperly disadvantages any other candidate.

Plagiarism is a form of cheating. It is taking and using someone else's thoughts, writings or inventions and representing them as your own, for example:

- 🌀 using an author's words without putting them in quotation marks and acknowledging the source
- 🌀 using an author's ideas without proper acknowledgment, or
- 🌀 copying another candidate's work.

All your assessable works may be submitted to the plagiarism checking service *TurnItIn* to obtain a report on possible instances of plagiarism. Assessable works may also be included in a reference database.

Candidates engaging in any form of academic misconduct may be subject to the imposition of penalties that range from a deduction/ cancellation of marks to exclusion from the course.

Assessment Rubrics

The following rubrics are applied in assessing your Project Review and Oral Defence. In order to achieve this award, you need to be assessed as proficient (at a minimum) in **ALL** the listed criteria. Note that proficiency is generally considered to be a higher standard than a 50% passing grade.



Project review

Candidate name:

Submitted date:

Assessor name:

Assessment date:

Project review result

- The candidate has successfully completed a detailed project review to the required standard; **OR**
- The candidate has not yet met the required standard for their project review; **AND**
- The candidate has been provided with feedback and informed of the assessment result and the reasons for the decision.

General comments / feedback

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Assessor signature:

Date:



Project Review	Mastered	Advanced	Proficient	Developing	Basic
Analysis	Creates new theories, paradigms or models to explain complex problems, situations or issues	Applies complex concepts, theory and evidence from past studies to formulate solutions to complex problems or issues	Applies a range of methods and approaches to solve increasingly complex problems	Views and reframes problems or issues from multiple perspectives to better identify possible solutions	Completes basic analysis of a problem or issue using standard methods, concepts and tools
Critical thinking	Produces new insights or knowledge that challenges current thinking, theory or flaws in logic	Designs, uses and evaluates research and research methods to accurately investigate complex problems, situations or issues	Applies the critical elements of a methodology or theoretical framework to flexibly and precisely complete a broader based investigation	Defines the critical elements of the methodology or theoretical framework for completing a routine inquiry or investigation	Collects information to investigate and gain an accurate understanding or perspective on a routine problem or issue
Problem solving	Tests solutions and displays sound judgement when synthesising information across multiple variables	Displays sound judgement when making decisions involving complex problems	Uses experience and information to generate a variety of high-quality alternative approaches to resolve a problem	Completes comprehensive problem analysis using a range of advanced processes, techniques and tools	Analyses problems accurately using a range of standard processes, techniques and tools
Recommendations	Devises new solutions to a problem by collating, analysing and synthesising research and practice	Frames solutions or guiding hypotheses that are sensitive to a variety of contextual factors	Decisively chooses the most effective solution after evaluating available solutions to a problem	Makes judgements and justifies decisions based on analysis of results from the problem solving process	Investigates and identifies a limited range of possible solutions for effectively addressing a problem

Assessor notes:

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Project Review: 10-point style guide	PROFICIENT	DEVELOPING / UNSATISFACTORY
Grammar and spelling are correct.		
Plain, professional English is used.		
Acronyms and jargon are avoided / clearly explained.		
Information is organised into small, manageable paragraphs that cover one main idea.		
Key information is presented first, followed by the details.		
A table of contents and page numbering is used.		
Fonts are of an appropriate size and consistently used.		
Headings, subheadings, and bullets appropriate to the format are used to break up the information so it is easier to scan and process.		
Visual supplements (diagrams, illustrations, tables and charts) are legible, relevant and clearly explained.		
Page-breaks, line and paragraph spacing enable easy reading.		

Assessor notes:

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Oral defence

Candidate name:

Submitted date:

Assessor name:

Assessment date:

Oral defence result

- The candidate has successfully completed an oral defence of their project review to the required standard; **OR**
- The candidate has not yet met the required standard for their oral defence; **AND**
- The candidate has been provided with feedback and informed of the assessment result and the reasons for the decision.

General comments / feedback

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Assessor signature:

Date:

Oral Defence	Mastered	Advanced	Proficient	Developing	Basic
Analysis	Supports diagnosis and opinions with strong arguments and evidence; presents a critical view; interpretation is outstanding	Supports diagnosis and opinions with reasons and evidence; presents a balanced view; interpretation is both reasonable and objective	Supports diagnosis and opinions with reasons and evidence; interpretation is reasonable	Supports diagnosis and opinions with limited reasons and evidence; interpretation lacks clarity; presents a somewhat one-sided argument	Supports diagnosis and opinions with few reasons and little evidence; argument is one-sided and not objective
Critical thinking	Can develop predictive models or scenarios anticipating future effects or events	Identifies connections between causes and even seemingly unrelated issues or problems	Undertakes often complex causal analysis to solve increasingly complex problems	Modifies and refines basic investigative processes, techniques and tools to improve results	Evaluates and reflects on results from a critical analysis and considers the implications for personal thinking and practice
Recommendations	Presents detailed, realistic, and appropriate recommendations clearly supported by the information presented and best-practice	Presents specific, realistic, and appropriate recommendations supported by the information presented and best-practice	Presents realistic or appropriate recommendations supported by the information presented and best-practice	Presents realistic or appropriate recommendations albeit with little support from the information presented and best-practice	Insufficient, invalid or irrelevant recommendations.
Clarity	The discussion would readily be understood by a non-expert audience	All but a relatively small number of highly technical pieces of the discussion would be understood by a non-expert audience	Most components of the discussion would be understood by a non-expert audience	Some components of the discussion would be understood by a non-expert audience	A majority of the discussion of the presentation would not be understood by a non-expert audience
Defence	Masterfully defends research by providing clear and insightful answers to questions; discussion was superior, accurate, and engaging	Competently defends findings by providing very helpful answers to questions; may occasionally need further reflection on minor points	Defence sufficient and with few errors; greater foundation needed from past work in area	Adequately defends research; answers questions, but often with little insight; frequently shows a need for deeper reflection on certain points	Does not adequately defend research; does not answer key questions; displayed poor grasp of material

Assessor notes:

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