

PMP Bootcamp: Planning for Project Resources – Setting Your Team & Project Up for Success

Student Name: _____ Date: _____

Instructions: Getting the right resources (people, equipment, materials) and planning how to manage them is a cornerstone of successful project management. This worksheet explores the Project Manager's leadership responsibilities in resource management and the key elements of planning for these vital assets.

Core Concept Reminder (from PMBOK 7 & Rita):

- **PMBOK 7th Edition:** The "Team" and "Project Work" performance domains are highly relevant. Principles like "Build a Culture of Accountability and Respect" and "Focus on Value" guide how resources are planned and utilized. Tailoring is key.
- **Rita Mulcahy's PMP Exam Prep (11th Ed.):** Stresses that resource planning isn't just about listing names; it's about defining roles, responsibilities, required skills, and how team members will be acquired, developed, and managed.

Part 1: The Project Manager's Leadership Responsibilities in Resource Management

Effective resource management goes beyond just assigning tasks. It requires leadership. Consider the following leadership responsibilities. Briefly explain *why* each is important for effective resource management:

1. **Creating a respectful and trusting environment:**

- Why important: _____

2. **Supporting team member growth and development:**

- Why important: _____

3. **Facilitating collaboration and communication within the team:**

- Why important: _____

4. **Proactively identifying and addressing resource constraints and conflicts:**

- Why important: _____

5. **Empowering the team (where appropriate):**

- Why important: _____
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Part 2: The "Plan Resource Management" Process – Laying the Groundwork

Purpose: The process of defining how to estimate, acquire, manage, and use team and physical resources. It establishes the approach and level of management effort needed.

1. **Why is it important to *plan* how you will manage resources, rather than just reacting as needs arise?**
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Key Inputs (Artifacts & Information Needed for Planning Resource Management):

What information or documents would a PM need *before* they can effectively plan resource management? Match the input with its contribution:

Input/Artifact		How it Helps in Planning Resource Management
1. Project Charter	_____	A. Describes project deliverables and work, helping identify resource types and quantities needed.
2. Project Management Plan (e.g., Quality Mgt Plan, Scope Baseline)	_____	B. Influences resource selection (e.g., skills needed to meet quality standards; resource types for specific scope).
3. Project Documents (e.g., Requirements Documentation, Risk Register, Stakeholder Register)	_____	C. Provides high-level project description, objectives, and identifies preassigned resources or constraints.

4. Enterprise Environmental Factors (EEFs) _____

D. Includes organizational culture, existing resource availability, marketplace conditions, org structure.

5. Organizational Process Assets (OPAs) _____

E. Provides templates for resource plans, lessons learned from past projects, historical information.

Methods & Tools for Planning Resource Management:

How do we actually *do* the planning? Briefly describe how each method/tool contributes:

1. **Expert Judgment:**

- Contribution: _____

2. **Data Representation (e.g., Charts):**

- Examples: Hierarchical Charts (like WBS, OBS, RBS), Responsibility Assignment Matrix (RAM/RACI), Text-Oriented Formats.
 - Contribution of a **RACI Chart (Responsible, Accountable, Consulted, Informed):**
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3. **Organizational Theory:**

- Contribution: _____

4. **Meetings:**

- Contribution: _____
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Part 3: Key Outputs (Artifacts OF Plan Resource Management)

What key documents are created as a result of the Plan Resource Management process?

1. **Resource Management Plan:**

- **What it is:** A component of the project management plan that provides guidance on how project resources (team and physical) should be categorized, allocated, managed, and released.
- **Key information it might contain (list three examples):**
 - i. _____
 - ii. _____

iii. _____
(Examples: Roles and responsibilities, project organization charts, team acquisition strategy, team development plan, resource control methods, recognition plan)

2. Team Charter:

- **What it is:** A document that establishes team values, agreements, and operating guidelines for the team. It helps the team develop a shared understanding of how they will work together.
 - **Why is it beneficial for the *team* to be involved in creating the Team Charter?**
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- **Key information it might contain (list two examples):**
 - i. _____
 - ii. _____(Examples: Team values, communication guidelines, decision-making criteria, conflict resolution process, meeting guidelines, team agreements)

3. (Updates to) Project Documents:

- The planning process might lead to updates in other documents like the Assumption Log or Risk Register.
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Part 4: Connecting the Dots – Scenario & Insight

Scenario: You are planning a project to develop a new company website. The project involves a graphic designer, a content writer, two web developers, and a QA tester. Some team members will be internal, but you might need to hire a specialized developer.

1. Referring to the **Resource Management Plan**, what specific guidance would you want this plan to include regarding the *acquisition* of the specialized developer?
 2. How would a **RACI chart** be useful for this website project team? Give a specific example related to a task like "Approve final website design."
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3. **PMBOK 7 & Tailoring:** How might the formality and detail of the Resource Management Plan and Team Charter differ for this small website project compared to a large, complex construction project with hundreds of team members?
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Key Takeaway: Planning for resource management is a proactive step that sets the foundation for how you will obtain, manage, and develop your project team and utilize physical resources. Strong leadership is essential throughout this process to foster a positive and productive environment.