PMP Bootcamp: Understanding Key Project Roles

Student Name: _____ **Date:** _____

Instructions: Welcome to the world of project management! Understanding who does what is fundamental to project success. This worksheet will help you grasp the key responsibilities and distinctions of various project roles. Use your RMC PMP Exam Prep book (11th Ed.) and your understanding of PMBOK Guide (7th Ed.) principles to complete the exercises.

Core Concept Reminder (from PMBOK 7 & Rita):

- **PMBOK 7th Edition:** Focuses on delivering **value** and tailoring the approach. While specific role titles might vary, the *functions* these roles perform are critical. Think about who enables the project environment, leads the team, engages stakeholders, and navigates uncertainty.

- **Rita Mulcahy's PMP Exam Prep:** Emphasizes the practical application of project management and the distinct responsibilities of the Project Manager in various situations.

Part 1: Meet the Players – Role Descriptions

Briefly review the core focus of each role:

1. **Project Manager (PM):** The individual assigned by the performing organization to lead the team responsible for achieving the project objectives. They integrate all aspects of the project, manage constraints (scope, schedule, cost, quality, resources, risk), and are the primary communicator.

   o *Focus:* Achieving project objectives, leading the team, managing constraints.

2. **Agile Team Leader Roles:**

   o **Scrum Master:** A servant-leader for the Agile team, ensuring Scrum (or other Agile framework) is understood and enacted. Facilitates events, removes impediments, coaches the team.

      ▪ *Focus:* Facilitation, impediment removal, coaching Agile practices.

   o **Team Lead (Agile Context):** Often a senior team member who guides technical work, helps resolve technical issues, and mentors other team members. May or may not be the Scrum Master.

      ▪ *Focus:* Technical guidance, team mentorship within their domain.

   o **Agile Coach:** Works with teams and the organization to improve Agile practices, mindset, and values. Often has a broader scope than a Scrum Master.

- **Focus:** Organizational Agile adoption, advanced coaching.

3. **Product Owner (PO):** (Primarily Agile) Represents the voice of the customer and stakeholders. Manages and prioritizes the product backlog to maximize the value delivered by the team.

   - *Focus:* Maximizing product value, managing product backlog, representing customer needs.

4. **Product Manager:** (Often broader than PO) Defines the product vision, strategy, and roadmap based on market research and business objectives. May oversee multiple products or Product Owners.

   - *Focus:* Product vision, market strategy, long-term product success.

5. **Project Sponsor/Initiator:** The individual or group that provides financial resources and support for the project. Champions the project, has ultimate authority, and makes key decisions like go/no-go .

   - *Focus:* Authorizing project, championing, providing resources, ultimate accountability.

6. **Project Team:** The group of individuals who perform the work of the project to create its deliverables.

   - *Focus:* Executing tasks, creating deliverables, applying expertise.

7. **Stakeholder:** Any individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project.

   - *Focus:* Varies based on their interest/influence; could be positive or negative.

8. **Functional or Resource Manager:** Manages a specific department (e.g., engineering, marketing) and the resources within it. Assigns resources to projects and is responsible for their professional development.

   - *Focus:* Managing departmental resources, skill development, resource assignment.

9. **Program Manager:** Manages a group of related projects (a program) in a coordinated way to obtain benefits and control not available from managing them individually.

   - *Focus:* Coordinating related projects, achieving strategic benefits across projects.

10. **Portfolio Manager:** Manages a collection of projects, programs, sub-portfolios, and operations (a portfolio) to achieve an organization's strategic objectives. Focuses on selecting the *right* work.

    - *Focus:* Aligning projects/programs with organizational strategy, optimizing investment.

Part 2: Who Does What? Matching Activity

Match the role on the left with its primary responsibility or characteristic on the right. Some responsibilities might seem to fit multiple roles, choose the *best* fit.

Role		Primary Responsibility/Characteristic
1. Project Manager	____	A. Manages and prioritizes the product backlog.
2. Scrum Master	____	B. Ultimately authorizes the project and provides funding.
3. Product Owner	____	C. Defines the long-term product vision and market strategy.
4. Project Sponsor	____	D. Manages a collection of projects and programs to achieve strategic business objectives.
5. Project Team Member	____	E. Responsible for achieving overall project objectives and managing constraints.
6. Functional Manager	____	F. Removes impediments and facilitates Agile team events.
7. Stakeholder	____	G. Manages a group of related projects to achieve shared benefits.
8. Program Manager	____	H. Anyone affected by or who can affect the project.
9. Portfolio Manager	____	I. Performs the hands-on work to create project deliverables.
10. Product Manager	____	J. Manages resources within a department and assigns them to projects.

Part 3: Role Distinctions – Short Answers

Answer the following questions concisely.

1. **Project Manager vs. Scrum Master:**
   In one sentence, what is a key difference in their primary focus, especially regarding team leadership and project work?

   _____

   _____

2. **Product Owner vs. Product Manager:**
   While sometimes combined, if these roles are separate, how might their focus differ regarding daily team interaction versus long-term market strategy?

   _____

   _____

3. **The Sponsor's Power:**
   Name two critical contributions a Project Sponsor makes that a Project Manager typically cannot do on their own.
   a. _____
   b. _____

4. **Why are Functional Managers important to a Project Manager, especially in a matrix organization?**

   _____

   _____

Part 4: Scenario Spotlight

Read the scenarios and identify the *primary* role(s) (from the list above) best suited to handle the situation or who would be most involved.

Scenario 1: The development team is consistently blocked by a slow procurement process for new software licenses. They need someone to help navigate the organizational hurdles.
* *Who is best positioned to remove this impediment in an Agile environment?* _____

Scenario 2: A significant new market opportunity has emerged. The company needs to decide if they should initiate a new project to develop a product for this market and ensure it aligns with the company's overall business goals.
* *Who would typically make the decision to initiate such a project and ensure its strategic alignment?* (Hint: Think high-level) _____ & _____

Scenario 3: The marketing department and the engineering department disagree on the priority of features for the upcoming product release. The project needs clear direction on what to build next to deliver the most customer value.
* *Who is responsible for making the final decision on feature prioritization for the release backlog? _____*

Scenario 4: A project is experiencing significant delays. The Project Manager needs to escalate issues beyond their control and request additional support or a critical decision about the project's future.
* *Who is the key person the Project Manager would escalate to for this level of support/decision? _____*

Scenario 5: An organization wants to ensure all its projects and programs are delivering the maximum strategic value and that resources are allocated to the most important initiatives.
* *Which role is primarily responsible for this oversight? _____*

Part 5: Connecting the Dots – Insight Questions

1. **PMBOK 7 Principle: "Effectively engage with stakeholders."**
   Why is understanding the different roles of your stakeholders (e.g., Sponsor, Functional Manager, End User) crucial for effective engagement?

   _____

   _____

   _____

2. **Adapting to Change (Predictive vs. Agile):**
   Consider the **Project Manager** role. How might their day-to-day activities and focus differ if they are managing a highly predictive (waterfall) project versus supporting a project using an Agile approach (where there might also be a Scrum Master and Product Owner)?

   o *Predictive PM*
     Focus: _____

   o *Agile Environment PM Focus (if present alongside SM/PO): _____*

Key Takeaway: While titles can vary between organizations, the *functions* performed by these roles are essential for project, program, and portfolio success. Understanding these functions helps you navigate project environments effectively!