Project Workflow Management[1]

Communication Management Processes[2]

By Dan Epstein

Note: *This article is based on the book Project Workflow Management: A Business Process Approach by Dan Epstein and Rich Maltzman, published by J Ross Publishing in 2014. The book describes PM Workflow® framework, the step-by-step project workflow guiding approach using project management methods, practical techniques, examples, tools, templates, checklists and tips, teaching readers the detailed and necessary knowledge required to manage project "hands-on" from scratch, instructing what to do, when to do and how to do it up to delivering the completed and tested product or service to your client. This article is the next part in the series Project Workflow Management.*

The project workflow framework is the result of Dan's research into the subject, having the following objectives:

1. Create the virtually error-free project management environment to ensure significant reduction of project costs
2. Reduce demands for highly qualified project managers using the step-by-step workflow guiding approach.

While PM Workflow® is the continuous multi-threaded process where all PM processes are integrated together, this article will attempt to describe the Communication Management group of processes as a stand-alone group of processes that can be used independently outside of PM Workflow® framework. It will be difficult in this article not to venture into processes outside of the current topics, such as planning, quality, risk and other management processes, so they will be just mentioned. However, to get full benefit and the error free project management environment, the complete implementation of PM Workflow® is required. In order to understand how PM Workflow® ensures this environment, I strongly recommend reading my article Project Workflow Framework – An Error Free Project Management Environment *in the PMI affiliated projectmanagement.com at (*https://www.projectmanagement.com/articles/330037/Project-Workflow-Framework--An-Error-Free-Project-Management-Environment*)*

The article above provides the overview and explanation of how the project workflow framework works and achieves the established objectives.

For more information, please visit my website www.pm-workflow.com

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Purpose

The purpose of Communications Management is to define methods of communication between project team members in delivery, subcontractor and business organizations in order to generate and exchange project related information and to facilitate understanding between the sender of information and the receiver.

The Communications Management process is a tool for the proper identification of stakeholders, developing project reporting and templates for different types of project communications as well as scheduling effective communications to all stakeholders.

Communication Channels

Poor project communication greatly contributes to project failure, because it becomes impossible to resolve differences in expectations between the delivery team and stakeholders. In fact, ineffective communications may easily cause differences in expectations between the delivery team and its external stakeholders. The main reason for poor communication is insufficient time management, when team members are busy and other priorities do not (apparently) allow communication in a timely manner. In fact, communications should be given high priority – it is often its absence which has caused the conflicting issues to arise in the first place. Other contributors to poor communications include cultural differences, time zone challenges, and in some cases, the pure volume and intensity of the information that must be exchanged.

During the course of the project the project managers spend much of their time communicating with a client, management, team members, suppliers, subject matter experts, and so on. Delivery team members must communicate between themselves. Support personnel must communicate with team members and clients. Everybody may have to communicate with everybody else, but in large project teams it is almost impossible for the PM to pay enough attention to everybody and their diverse needs for differing information at different times. So, it is imperative to maximize the effectiveness of the communications channels that convey the most important project information.

There is a formula for calculating communication channels and links: **N*(N-1)/2**, where N is a number of people involved in communication. Thus, in a team of 5 members there are 5*(5-1))/2=10 two-way communication channels. In a team of 10 there are 45 channels and in a team of 23 there are 253 communication channels. You can see that the number of channels goes up exponentially with the number of members. This may prove to be unmanageable communication between all team members. The often-used technique to resolve this problem is to split large teams into manageable groups, having each Team Lead serve as a focal point for all communications outside that group. For example, if a team of 23 is split into three groups, having a project manager and three Team Leads with eight team members in two groups and seven members in the third group, then there are 6 communication channels between project manager and three Team Leads, plus 28*2+21 communication channels in each team, making a total of 28*2+21+6=83 communication channels. This is significantly less than 253 channels for the same number of team members shown earlier.

Stakeholders

Stakeholders are members of the delivery, business or subcontractor organization, as well as others, who have a stake in the project or those whose interests may be positively or negatively affected by the project. Here we mean to include that time in which the project is under

execution as well as the end product's steady-state or production operation. In fact, even your family may be stakeholders of your project, since their livelihood may be affected if you lose your job. The latest edition of the PMBOK® Guide even dedicates a brand-new knowledge area uniquely to Stakeholder Management. Here's an example. If your project is the automation of a manual assembly line, which is going to reduce assembly personnel tenfold, then, obviously, many assembly line managers will strenuously object to the project and will do everything possible to delay or block it.

Different stakeholders will have different interests in the project, sometimes mutually exclusive. This is why it is important to analyze project stakeholders – understanding their influence, interests, and attitude towards the project - and to develop plans to extract the most benefits from communication with them, at the same time fully understanding them to help neutralize opposition to the project from important stakeholders.

You should try to sway powerful stakeholders to support your project right at the beginning, by highlighting how each one of them benefits from the project. This may help you in getting required resources on time and ensure their support when necessary, which improves chances of your project's success. If you anticipate stakeholder reaction, you may use it in your communication, enhancing support and managing the opposition.

Project stakeholders should be identified and documented in Table 9-1 in the order of stakeholders' power and influence. Stakeholders' motives, interests, influence, their preferred method of communication must be analyzed, enabling the project manager to develop specific ways of communication with stakeholders.

Table 9-1 Stakeholders List Form

#	Name	Position/ Organization	Stake in the Project	Phone	email

Communication Types

There are several types of project communication:

1. Proactive Communication
2. Meetings and Reports
3. Orientation and Training

Proactive Communication

When people are unpleasantly surprised or receive bad news at the last minute, it may become a serious problem, damaging business relationships not only between the delivery team and the client, but also between different groups within the delivery organization.

For example, if the resource manager informs the project manager at the last moment that the resources committed earlier for project activities are not available, it frustrates the project manager and often does not leave a chance to develop an alternative. The client will have similar feelings if the project manager informs the client that the project will be delayed with no new date set because the planned resources are not available – and does this at a regular status meeting. This has the "double bad" effect of **surprising** and **alienating** key client stakeholders.

Proactive communication means that the affected side is informed as soon as a new risk is discovered, long before it becomes an issue. Both sides will have time to review alternatives and develop risk remediation plans.

The same is true if the client anticipates significant changes in the project scope. Learning about this scope change at the last moment may lead to getting stuck with unused resources or with the lack of required resources, when there is no time left to resolve the situation.

Poor communications also happen *within* the delivery team if delivery team members are left on their own and may be confused with details of their assignment. This may happen due to the insufficient communication between the project manager and team members. The delivery team members must proactively communicate the lack of information before errors are made. It's the PM's job to set these communications expectations early in the project.

Proactive communication is often an informal communication, such as a phone call, business lunch or even a short chat in the hall. If a subject of discussion is important enough, it may be necessary to send an email to the source of information with a brief outline of the subject discussed and decisions made. This should be used with caution, because it may be counterproductive to document the subject of a confidential conversation, especially with influential stakeholders.

Recommendation for what types of media are best for various project communications can be found in *"A Project Managers Guide to Emotional Intelligence"* by Anthony Mersino.

A Communications Plan should include a simple guide or matrix which shows the preferred types of media and periodicity of communications for key project information exchange, identifying intent and audience for each exchange of information.

Meetings and Reports

Meetings take place when several people are required to get together in order to make a common decision, to conduct a review or discuss an issue. Meetings may be scheduled in advance in accordance with the project plan or called on a short term notice, due to the occurrence of an urgent event. Status meetings should always be accompanied by status reports.

Planned Meetings

Planned meetings are meetings that are planned in advance and appear in the project plan. Those meetings are associated with planned events in the project, like the end of the project Frame, the completion of a deliverable, etc. Some planned meetings take place at specific dates and are scheduled long in advance. Many types of planned meetings have been described in details in other sections of the book, such as QC Reviews, QA Audits, BRD

Review and others. Other planned meetings are several types of the Project Status meetings. The processes below must be followed in all planned meetings:

1. Send Meeting Notification and Invite Participants; include all logistics, such as the venue, start time, end time, any required preparation, and any multimedia links
2. Send Meeting Agenda and applicable Documentation or Reports
3. Conduct Meeting and Take Meeting Minutes
4. Distribute Meeting Minutes
5. Receive Corrections to Recorded Minutes
6. Document the meeting in the PCB
7. Take Actions According to Meeting Decisions

There are five types of planned status review meetings and their frequency for the duration of the project:

1. Delivery Team Status Review - weekly
2. Client Status Review - weekly
3. Business Executive Status Review - monthly
4. Delivery Executive Status Review - monthly
5. Subcontractor/Offshore Team Status Review - weekly

All status reviews may be face-to-face meetings, teleconference, videoconference, or mixed. Consideration must be given to the economic, ecological, and effectiveness attributes each of these meeting types has to offer.

Delivery Team Status Review Meeting

The objectives of the Delivery Team Status Review meeting are to review progress of each delivery team member and the overall project progress for the past week. The following items will be reported by each team member:

- Weekly Status Reports.
- Report active action items assigned.
- Report progress of the assigned tasks and tasks actuals vs. plan.
- Report open issues and the progress in their resolution.
- Report new risks and the progress in the risk remediation planning.
- Report QC results.
- Report plan for the next two weeks and the forecast for its implementation

After individual review is completed, the following subjects will be discussed with the entire team:

- Overall project status against the plan
- Overall project risks and issues
- Active change requests
- Status of the project QA audits
- Status of QC reviews
- New and unresolved team conflicts (note: handle conflict carefully – some conflicts must be handled on a pairwise basis and not publicly).
- Overall management decisions related to the project

- Client satisfaction and the client feedback

If the delivery team is split into several sub-teams, each with a separate team lead, then the individual team member review will be conducted by the team lead and the overall team review by the project manager. Team leads will provide a summary of the individual team member reviews, highlighting the most essential information.

The Delivery Team Status Review meeting must be scheduled in advance to run weekly as a face-to-face meeting or teleconference. If the review is held via teleconference, then status review reports must be received by project manager or team leads at least several hours in advance. At the start of the meeting a scribe must be assigned to take notes.

Individual Delivery Team Status Report

The Individual Delivery Team Status Report, as shown on Table 9-2 must be filed in the PCB as a spreadsheet in electronic form, but a hardcopy must be available for a face-to-face meeting. This Status Report consists of two parts:

1. Report on work performed by the team member for the reporting period.
2. Work forecast for the next two weeks.

The following are fields for the first part:

1. Task ID
2. Task Name
3. % Completed (with a metric to represent this which has been agreed on up front)
4. Scheduled Start Date
5. Actual Start Date
6. Scheduled End Date
7. Planned/Actual End Date
8. Budgeted Hours
9. Actual Hours Worked So Far
10. Additional Time Needed (Hours)
11. Reason for Delay (if any)
12. Comments/Concerns Requiring Management Attention

Table 9-2 Team Weekly Status Report Form

Project Name:
Weekly Status Report for week ending on:
Name:

Task ID	Scheduled Task Name for the Reported Week	% Compl	Sched. Start Date	Actual Start Date	Sched. End Date	Planned / Actual End Date	Budgeted Hrs	Actual Hrs Worked	Addt'l Time Needed (Hrs)	Reason for Delay
Comments/Issues/Concerns Requiring Management Attention:										

Task ID	Planned Activities/Tasks for the Next Two Weeks	Sched. Start Date	Actual Start Date	Sched. End Date	Budgeted Hrs	Comments

The following are fields for the second part of the report (next two weeks):

1. Task ID
2. Planned Activity/Task
3. Scheduled Start Date
4. Actual Start Date (if started)
5. Scheduled End Date
6. Budgeted Hours
7. Comments

Client Status Review Meeting

The purpose of the Client Status Review meeting is to provide the client with an update on the project status and to discuss all opened issues, change requests and new risks. Also, the client satisfaction will be discussed at least once a month.

It is preferable to update the client of the status of project milestones rather than to tediously review detailed tasks that do not have business meaning to the client. This is done in order to avoid client attempts to micromanage the project and explain technical issues to a non-

technical client. At the end of the review the client should have good visibility of the project and the project issues – and it's worthwhile to check in and verify that they agree they're getting the needed visibility.

The Client Status Review meeting must be scheduled in advance to run weekly either as a face-to-face meeting or teleconference. If the review is held via teleconference, then the status review report and related documentation must be received by the client at least several hours in advance. At the start of the meeting a scribe must be assigned to take notes.

The Client Satisfaction discussion will be held monthly and based on results provided by the Client Satisfaction Review tool, as discussed in the Client Satisfaction QA Audit section of the book.

Client Status Report

The Client Status Report template is provided in Table 9-3.

Table 9-3 Client Status Report Form

Project Summary	
Project Name: _____	
Project Manager Name: _____ Client Name: _____	
Reporting Period _____ Planned Completion Date: _____	
Total # of Scope Changes: _____ Total Cost of Scope Changes: _____	
Active Issues	
Issue Brief Description	**Issue Status**
Major Milestones-1	
Milestone Name:	
Planned Start Date: _____ Actual Start Date: _____	
Planned End Date: _____ Actual End Date: _____	
Status: □ Not Started □ In Process □ Completed	
Comments:	
Major Milestones-2	
Milestone Name:	
Planned Start Date: _____ Actual Start Date: _____	
Planned End Date: _____ Actual End Date: _____	
Status: □ Not Started □ In Process □ Completed	
Comments:	
Major Milestones-3	
Milestone Name:	
Planned Start Date: _____ Actual Start Date: _____	

Planned End Date: _____	Actual End Date: _____	
Status: □ Not Started	□ In Process	□ Completed
Comments:		
Financial Summary		
Planned Project Cost: _____	Cost of all Scope Changes: _____	
Actual Cost Up To Date: _____	Cost Outlook: _____	
Comments: :		
Client Satisfaction Review		
Date of the Last Review: _____	Satisfaction Rating: _____	
Progress Made:		
Comments:		

Business Executive Status Review Meeting

The Business Executive Status Review is the same as the Client Status Review meeting, but with the presence of the business executive. Since the meeting is held once a month, the reporting period for the report is monthly. The meeting may be combined with the Client Status Review meeting, but in this case only the Business Executive Status Review Report is provided. This meeting is required to ensure that the project is aligned with the corporate business strategy and to keep the project properly visible to business executives. Since a business executive is an influential business stakeholder, it is wise to know his/her project vision and maintain the executive's support.

The project manager must be realistic about having the business executive present once a month at the review, since the executive will attend only meetings of high priority. This depends on the visibility of the project, its size and the effect of the project on the business. Nevertheless, a business executive must be invited to participate well in advance and the meeting agenda and materials must be sent out at least two days in advance.

Business Executive Status Review Report

The Business Executive Status Report is the same as the Client Status Report, except that the Reporting Period field must indicate one month, rather than one week as in the Client Status Report.

Delivery Executive Status Review Meeting

The objective of the Delivery Executive Status Review Meeting is to keep delivery executives up to date about the project health.

This monthly meeting should be scheduled by the executive office, which invites between five to eight project managers to report on their projects. These projects may be from a variety of business areas and may be unrelated. Each project manager must present one project in about five to ten minutes, walking through the Delivery Executive Report in Table 9-4 and answering questions, if any. The following information in presented at the meeting:

- High level project perspective
- Major unresolved issues
- Major project risks
- Project Quality Audits
- Project financial health

Along with the executive and project managers, intermediate managers associated with the reported projects are also in attendance.

Delivery Executive Status Review Report

The Delivery Executive Status Review Report template is shown on Table 9-4.

Table 9-4 Delivery Executive Status Review Report Form

Delivery Executive Status Review Report

Reporting Period From ___/___/_____ (MM/DD/YY) to ___/___/_____ (MM/DD/YY)
Project Name: _____ PM Name: _____
Client Business Area: _____ Client Name: _____
Frame: _____ Frame Budget: _____ Projected Cost of the Frame: _____

Current Frame Major Milestones

#	Milestone Name	Due Date	Done?	Actual Delivery Date	Schedule Performance Index	Cost Performance Index

Comment:

Financial Summary ($$)

Current Month Plan: _____ Actual Month Plan: _____

Current Frame Plan: _____ Actual Frame Plan: _____
Projected Current Frame Outlook: _____

Total Project Plan: _____ Actual Project Plan: _____
Projected Total Project Outlook: _____

Comment:

Failed QA Audits in the Reporting Period

QA Date: _____ Non-Compliance Area: _____

QA Date: _____ Non-Compliance Area: _____

Comment and Root Cause Analysis of Non-Compliance:

Corrective Actions Taken:

Failed QC Reviews in the Reporting Period
Deliverable Name: _____
Deliverable Name: _____
Comment and Root Cause Analysis of Failure:
Corrective Actions Taken:

Earned Value Analysis

The financial status of the project for the reporting period may be presented as a screenshot of the EVA Tool shown in Chapter 15. It shows variances, performance indices, the projected cost of the project and the projected completion date, assuming that no significant performance changes will take place in the remaining time.

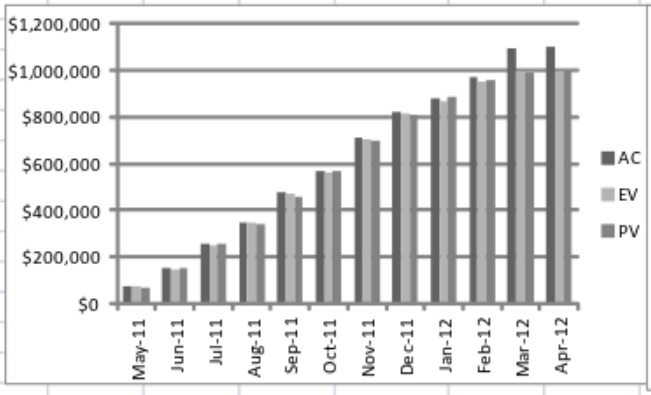
In order to see dynamics of the project performance for the preceding 12 months, in the graphical format, you should enter statistical data for PV, AV, AC and the starting month of the statistical report onto the Statistics page of EVA Tool, as shown on Fig 9-1.

Cumulat ve Financial Status Report

Start Month (MM/DD/YY)	**5/9/2011**		**Planned End:**	**5/3/2012**	
BAC	**$1,100,000**		**Project Manager:**	**John Smith**	

	May-11	Jun-11	Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12
AC	$78,000	$155,000	$254,000	$350,000	$475,000	$570,000	$715,000	$825,000	$880,000	$970,000	$1,092,200	$1,099,000
EV	$72,000	$148,000	$250,000	$350,000	$470,000	$560,000	$705,000	$815,000	$870,000	$950,000	$1,000,000	$1,000,000
PV	$70,000	$150,000	$260,000	$340,000	$460,000	$570,000	$700,000	$810,000	$890,000	$960,000	$990,000	$1,000,000

	May-11	Jun-11	Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12
CPI	92.3%	95.7%	98.4%	100.0%	98.9%	98.2%	98.6%	98.8%	98.9%	97.9%	91.6%	91.0%
SPI	102.9%	98.7%	96.2%	102.9%	102.2%	98.2%	100.7%	100.6%	97.8%	99.0%	101.0%	100.0%



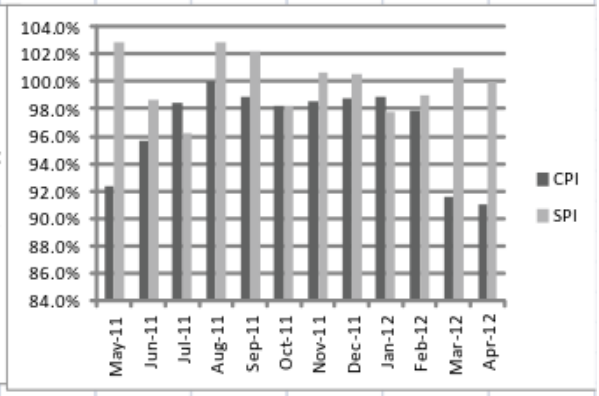


Fig 9-1 Sample of Financial Report

Subcontractor/Offshore Team Status Review Meeting

The objectives of the Subcontractor / Offshore Team Status Review meeting is to control the subproject implementation and ensure there won't be any negative impact on the project quality, cost and schedule.

In your relations with the subcontractor team you must see yourself as the client and the subcontractor's team as the delivery team. Even though your team may be as technical as the subcontractor's team, attempts to micromanage their project must be avoided. Most probably, you won't ever see their team or talk to most of their team members. If the subcontractor's organization is the offshore organization, you may not even see their project manager. Instead, you will meet weekly with their local representative in your physical area, who is usually a senior level expert. Considering that today most offshore companies are located in India, China and Eastern Europe, the time difference between your location and the offshore team may be between 7 and 14 hours. This makes it very difficult to hold regular teleconferences with their project manager, let alone team members, and reduces the subcontractor's visibility to the delivery team and the client.

In this environment it is of the utmost importance to provide the subcontractor with very detailed requirements eliminating the slightest possibility of misunderstanding, because cultural preference may disallow – or at least discourage - the offshore team to ask for clarifications. Experience with offshore teams clearly indicates that most problems with the offshore deliverables are caused by poor or misunderstood requirements, which could be avoided with more effective communications which consider cultural differences. The issue of cultural differences is explored in the book "Kiss, Bow or Shake Hands – The Guide to Doing Business in More than 60 Countries" by Terri Morrison and Wayne A Conaway.

The following information will be reported at the weekly meeting with the subcontractor/offshore representatives:

- Weekly status
- Next two weeks plan
- Issues, risks and action items
- Performance and quality

Subcontractor/Offshore Team Status Review Report

The Subcontractor Status Review Form is shown in Table 9-5.

Table 9-5 Subcontractor Status Review Form

Subproject Summary	
Subproject Name: _____	
Subcontractor Name: _____ PM Name: _____	
Reporting Period _____ Planned Completion Date: _____	
Total # of Scope Changes: _____ Total Cost of Scope Changes: _____	
Active Issues	
Issue Brief Description	**Issue Status**
Major Planned Subproject Milestones-1	
Milestone Name:	
Planned Start Date: _____ Actual Start Date: _____	
Planned End Date: _____ Actual End Date: _____	
Budgeted Hours: _____ Actual Hours: _____ Additional Hours Needed: _____	
Status: □ Not Started □ In Process □ Completed	
Comments:	
Major Planned Subproject Milestones-2	
Milestone Name:	
Planned Start Date: _____ Actual Start Date: _____	
Planned End Date: _____ Actual End Date: _____	
Budgeted Hours: _____ Actual Hours: _____ Additional Hours Needed: _____	
Status: □ Not Started □ In Process □ Completed	
Comments:	
Major Planned Subproject Milestones-3	
Milestone Name:	
Planned Start Date: _____ Actual Start Date: _____	
Planned End Date: _____ Actual End Date: _____	
Budgeted Hours: _____ Actual Hours: _____ Additional Hours Needed: _____	
Status: □ Not Started □ In Process □ Completed	
Comments:	
Financial Summary	
Planned Project Charges: _____ Charges for all Scope Changes: _____	
Actual Charges Up To Date: _____ Project Outlook: _____	
Comments:	

Event-Driven Meetings

Event-driven meetings are meetings that have not been previously scheduled. They take place when the urgent resolution of an issue is required. Sometimes the need for an event-driven meeting comes up during other meetings or even casual conversation or an email exchange. The standard meeting process is followed:

1. Send Meeting Notification and Invite Participants, specifying venue, purpose, agenda, and logistics
2. Send Meeting Agenda and applicable Documentation or Reports
3. Conduct Meeting and Take Meeting Minutes
4. Distribute Meeting Minutes
5. Receive Corrections to Recorded Minutes
6. Document the meeting in PCB
7. Take Actions According to Meeting Decisions

Sometimes, the meeting must take place within hours after the issue was brought up. There may not be enough time to send formal invitations and a detailed agenda. In this case, an impromptu conference call may be satisfactory and only the most essential people should be brought in after rearranging priorities of other scheduled activities.

Orientation and Training

Orientation is required to provide both the process and the project information to the project manager and the delivery team members, thus introducing them to the project and instructing them about existing processes and/or the technology used in the project. Training is required to:

- Enable users of the project to use – and to help produce - project deliverables in the correct and proper way.
- Assist the project manager and delivery team members to perform Quality Management activities.
- Engage the project manager, delivery team members and client in some essential processes and tools to perform their duty, such as the Scope Change Request process, Client Satisfaction Review tool, Risk Assessment tool and others.

Training materials must be prepared by the qualified personnel. Training should be scheduled to include all required participants. For example, quality management training is performed by a member of the Quality Management team. Sometimes delivery team members need professional training, but this is rarely done within the project framework. If the budget for such training does not come from the project, then this kind of training is not a part of a project.

The project manager's orientation usually takes place at the time of his/her assignment to the project. It may be given by the client, but sometimes a delivery manager may be present and may even provide orientation in specific technical issues that client does not know much about. One way to organize training is for the client to prepare a presentation, which must be documented in the PCB.

The delivery team orientation is provided in following areas:

- Project standards, methodology and processes

- Tools used on the project
- Technical issues

The Kick-Off meeting, which is described in the Requirements Frame section, is a special case of project orientation, which concentrates on the following:

- Project objectives, approach, schedule and facilities
- Roles and responsibilities

Meeting Agenda Form

The form in Table 9-6 may be used if no meeting scheduling tools are available, or if they are available, may be used as a checklist to assure that all proper logistics are covered.

Table 9-6 Meeting Agenda Form

Meeting Agenda
Project Name: _____
Meeting Initiator's Name: _____
Date: _____ Time: _____ □ AM □ PM
Location: _____
Reason for the Meeting: _____
List of Attendees:
Agenda Item1:
Agenda Item 2:

Meeting Minutes Form

The Meeting Minutes Form is shown in Table 9-7.

Table 9-7 Meeting Minutes Form

Meeting Minutes
Project Name: _____
Meeting Initiator's Name: _____
Date: _____ Time: _____ □ AM □ PM
Location: _____
Reason for the Meeting: _____
List of Attendees:
Minutes for Agenda Item1:

Minutes for Agenda Item 2:

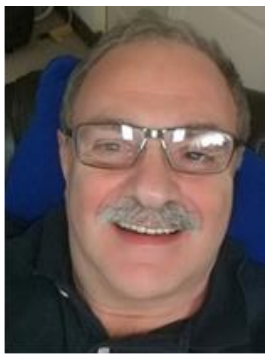
Communication Plan

The purpose of a communications plan is to establish specific rules for Communications Management in order to allow exchange of the project information between the project manager, delivery team, client, business users, management and other stakeholders.

There is no need to present a separate Communication Plan document, as long as the following elements are documented in the PCB as they occur and their schedule is included in the project plan:

- Establish all project status meetings, dates and periodicity, specifying the intent and audience of each
- Describe status report's contents and forms used to produce reports
- Establish orientation and training schedule
- Develop and produce all training materials

About the Author



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Dan Epstein combines over 25 years of experience in the project management field and the best practices area, working for several major Canadian and U.S. corporations, as well as 4 years teaching university students project management and several software engineering subjects. He received a master's degree in electrical engineering from the LITMO University in Leningrad (today St. Petersburg, Russia) in 1970, was certified as a Professional Engineer in 1983 by the Canadian Association of Professional Engineers – Ontario, and earned a master's certificate in project management from George Washington University in 2000 and the Project Management Professional (PMP®) certification from the Project Management Institute (PMI®) in 2001.

Throughout his career, Dan managed multiple complex interdependent projects and programs, traveling extensively worldwide. He possesses multi-industry business analysis, process reengineering, best practices, professional training development and technical background in a wide array of technologies. In 2004 Dan was a keynote speaker and educator at the PMI-sponsored International Project Management Symposium in Central Asia. He published several articles and gave published interviews on several occasions. In the summer of 2008 he published "Methodology for Project Managers Education" in a university journal. His book, *Project Workflow Management - The Business Process Approach*, written in cooperation with Rich Maltzman, was published in 2014 by J. Ross Publishing.

Dan first started development of the Project Management Workflow in 2003, and it was used in a project management training course. Later this early version of the methodology was used for teaching project management classes at universities in the 2003–2005 school years. Later on, working in the best practices area, the author entertained the idea of presenting project management as a single multithreaded business workflow. In 2007–2008 the idea was further refined when teaching the project management class at a university. Since 2009, Dan has continued working full time in Project Management. Dan can be contacted at dan@pm-workflow.com.