Are you stressing out over completing the application to take the PMP® Exam?

Sometimes I do joke that it takes more effort to complete the application to take the PMP® Exam than it does to take the actual exam, but I am just kidding. Relax; it doesn’t have to be that difficult! But I do know that it is nice to have some assistance, so here are some tips for you to consider, my goal is to make this process peaceful for you.

Before you begin, I do need to offer this disclaimer – the application and the contents and requirements for the completion of the application are all at the discretion of the Project Management Institute (PMI®). The requirements to qualify to take the PMP® Exam are also subject to the guidelines as defined by the Project Management Institute (PMI®). The PMI® is the absolute final authority. When in doubt, please visit www.pmi.org and take a look at their handbook.

Ready to get started? I am cheering you on!

Before you start to fill out the application make sure you have:

- A copy of your resume
  - Q: What if my resume is not current? That’s OK; your resume serves as a reminder of your work over the past few years. This is not the time to rewrite your resume. This is about the exam application.
- Status reports
  - Q: Why do I need status reports? Like your resume the status reports reflect what you worked on and when, it makes it easier for you to describe your experience. You do not provide the status reports with your application, this is just for you.
- A calendar
  - Q: Why do I need a calendar? To help you calculate how many hours and days you worked on projects, to reconcile when you completed your work.
- A calculator or access to Excel or a similar application.
  - Q: A calculator, is this a math quiz? No but it does help to be able to compute the hours you worked as you do need to have a specific number of hours of experience.
• A Copy of the Guide to the Project Management Body of Knowledge or PMBOK®.
  o Q: I thought I only needed this to study for the exam, why do I need it to complete the application? As you review and report your work experience, the PMBOK® will help you discuss your experience using the proper project management language.

• Other documentation that will remind you of your project work
  o Q. What other documentation do you mean? Basically anything you have that discusses the scope or nature of the projects you are reporting for your experience. This will help you define your experience more clearly. You will not submit this documentation with your application.

• Contact information for the people who you worked for or with on the projects that you are using for your experience
  o Q: Will PMI® contact people I have worked with? The answer is maybe. You may get audited (we will talk more about this later) and if you do some of the people you have listed as contacts may be asked to verify your work experience.

**Tip #1** - Do not complete and submit your application UNLESS you really meet all of the requirements to take the exam. If you are not sure about the requirements, you definitely want to go to [www.pmi.org](http://www.pmi.org) and review the guidelines.

**TIP #2** – Tell the truth, the whole truth and nothing but the whole truth. The exam is to certify qualified individuals. People who misrepresent themselves discredit themselves and the certification. Enough said.

**TIP #3** – Give yourself plenty of time to sit down and complete the application. Do not try to rush. Work on this when you can have a couple of hours of uninterrupted work time.

**Online or Hardcopy?**

Now you are ready to go. You can complete the application online or you can print out a copy and submit a hardcopy. You are encouraged to use the online application. Both are good valid choices. Select the approach that makes sense for you. If you use the online application you have ninety days to complete the application and submit it. If you use the hardcopy application you can take all the time you want. Why would you do that? If you are ready to apply for the exam, stick with it and move forward!

The turnaround time for an online application is about half of the turnaround time for a hardcopy application. Once your application has been approved you have one year to take the exam.
Q. I heard that some applications get audited is there a way to avoid getting audited? There seems to be a bit of urban legend about the audit process. There is no way to avoid getting audited and there is not something that triggers the process or causes your application to get audited. This is a random process. A small percentage of applications get audited. Relax. It is not personal! If you do get audited you will be asked to provide documentation that supports the information you provided on your application. This is why you TELL THE TRUTH on your application. When you provide truthful and accurate information on your application, you have no worries.

**Finally, the Actual Application**

The application starts off in a straight forward manner. You provide basic information about yourself, such as name, address, contact information, employment and educational background. You don’t need my help for this.

The area where most people have questions is about reporting project experience. You do need to provide information for EVERY project that you are using to report your hours of experience. For EVERY project you are reporting you will need to provide the name of the project, when it took place, your role, the organization where the work was performed and a contact who can verify the information you are providing. This is not too confusing.

Q. I do the work of a project manager, but my organization does not use the title project manager, what should I do? Use your job title. It is not about being called a project manager it is about doing the work of a project manager. If you use a false title and you are audited, your contact(s) might be confused as to why you used a different job title. This is just a silly way to cause confusion. It is what you did that matters.

**Reporting Your Experience**

As you report your experience for each project, you may notice that there is a comment made about overlapping projects and how to report them. What is this about? This means that if you worked on two projects during the month of January, it is one month of experience. It DOES NOT count as two months of experience.

In the example below, the months of experience while Project 1 and Project 2 were active is Jan-Feb-Mar-Apr-May or five months. Project 3 adds Jul-Aug-Sep-Oct or four months of experience for a total of nine months of experience.
The rest of reporting your experience is really about mapping your work to the way project work is organized per the PMBOK®. If the projects you worked on were already organized in this manner, this will be easy for you. But this is not always the case. This is why you have all that information about your work (resume, status, documents, the PMBOK®). You may need to do some translation. This is about you taking an honest look at the work you performed and reporting it in the language used by the PMI®.

**TIP #4** – Before you start entering or typing your experience, step back and look at the work you have performed. Divide it into the five major process groups: Initiating, Planning, Executing, Monitoring and Controlling and Closing. Do this one project at a time, because that is how you are reporting the information, one project at a time.
The application does give you some ideas as to the type of work you should be reporting, for example:

**PLANNING PROCESS**
- Identify key project team members and define roles and responsibilities to create a project organization structure to develop a communication plan.
- Create the work breakdown structure with the team to develop the cost, schedule, resource, quality and procurement plans.
- Identify project risks to define risk strategies and develop the risk management plan.
- Obtain project approval from the customer and conduct a kick-off meeting with all key stakeholders.
- Define and record detailed project requirements, constraints and assumptions with the stakeholders to establish the project deliverables.
- Develop change management plan to define how changes will be handled to manage the triple constraints.

**EXECUTING PROCESS**
- Manage proactively the resource allocation by ensuring that appropriate resources and tools are assigned to the tasks according to the project plan.
- Execute the tasks defined in the project plan in order to achieve the project goals.
- Ensure a common understanding and set expectations through communication to align the stakeholders and team members.
- Improve team performance by building team cohesiveness, leading, mentoring, training, and motivating in order to facilitate cooperation, ensure project efficiency and boost morale.
- Implement a quality management plan to ensure that work is being performed according to required quality standards.

The idea is that for each process and for each type of work performed you enter your hours. You then provide your total hours for each process group and then ultimately for the entire project. You do this for each project that you are reporting.

Would you like some ideas on how your work might translate? Here are a few to help you think about your work experience.

<table>
<thead>
<tr>
<th>Process Group</th>
<th>Task</th>
<th>Matching Work Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiating</td>
<td>Define the scope of the project based on the organization’s needs…</td>
<td>Defined type of laptops to be deployed and which departments would receive them.</td>
</tr>
<tr>
<td>Planning Process</td>
<td>Define and record detail project requirements….</td>
<td>Defined and documented hardware and software requirements for laptop deployment.</td>
</tr>
<tr>
<td>Executing Process</td>
<td>Execute the tasks defined in the project plan….</td>
<td>Coordinated and supervised deployment of laptops to specified employees.</td>
</tr>
<tr>
<td>Closing Process</td>
<td>Identify, document and communicate lessons learned.</td>
<td>Led a group discussion on what did and did not work well for this deployment.</td>
</tr>
</tbody>
</table>
Now you have what you did and how it maps to each process group, what about the hours? This is why it is helpful to have a calculator or Excel and your project documents and a calendar. You want to give accurate information about how much time you really spent on each project.

**TIP #5** – Consider creating a spreadsheet that allows you to calculate for each project, the start and end dates and the percent of your time you worked on that project. For example if you worked on the project for one month and you spent 50% of your time that would be 80 hours (assuming a 160 hour work month). You may also want to have columns for each process group so that you can break your time down by process group AND perhaps you would even take the tasks from the application and add them to your spreadsheet too so that you can allocate your hours within each process group and then for each task.

Once you have entered your hours for each project, process group and task you are ready to move on.

Q. What if I was not involved in all five phases on every project? That is OK. Sometimes you work an entire project from start to finish and sometimes you do not. Across ALL of the projects you submit for your experience you should have experience in all five of the process groups.

Now you need to provide some information about the deliverables you created as part of your project work. Once again you will submit information for each project. This is where you describe by phase the tasks you led and directed and the deliverables that were created. It is very important that you translate your work into language that is recognizable by the PMI®. Do not use the task descriptions from your industry or workplace UNLESS they are obvious matches. This means you need to honestly assess your work and describe it in project management speak. Be concise and specific. Here are some examples:

<table>
<thead>
<tr>
<th>Process Group</th>
<th>Task or Deliverable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning</td>
<td>Led the research which defined the hardware and software requirements for the laptop deployment. End result was the creation and acceptance of project requirements.</td>
</tr>
<tr>
<td>Planning</td>
<td>Directed team in creation of test plan.</td>
</tr>
<tr>
<td>Monitoring and</td>
<td>Assessed risks as implementation plan changed; continued to identify risk mitigations and contingencies until project completed.</td>
</tr>
<tr>
<td>Controlling</td>
<td></td>
</tr>
</tbody>
</table>

Guess what? You have made it through the parts of the application that most of us find the most challenging! You just have a little bit more to do.
Project Management Education

You need to document your project management education. This means you will provide information on a class or classes you have taken to learn about project management. See www.pmi.org for the required number of educational hours. One hour in the classroom counts as one hour of education. So if you take a class that meets for twelve weeks and it is three hours per week, you have thirty six educational hours. The courses you use for your hours must be pertinent to project management and relate to at least one of the bodies of knowledge as documented in the PMBOK®.

Q. What if the class I am taking now is the class I am going to use for my educational hours? That is great, but you cannot submit your application and claim the educational hours until after you complete the class.

Once you have completed your application, give it a good quality review check and submit it! Relax and then begin your exam preparations.

There are some products I recommend to help you and you can learn more about them by following this URL:

http://margaretmeloni.com/products_1.html

The PrepCast® products are the assistance I wish I had when I was studying for my PMP®. That is why I am pleased to recommend these products to you and proud to be an affiliate of The PM PrepCast® for which I do earn a referral commission.

Good luck to you as you continue on your path!