

# PLANNING COMPETENCES ICB4 Reference Guide



Version 1.0

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# **Planning Competences**

## ICB4 Reference Guide



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# Foreword

As IPMA celebrates its 60th anniversary, we reflect on its remarkable journey and reaffirm its founding mission: to enhance the competences of individuals in Project Management. Over six decades, IPMA has cultivated a global network of practitioners, fostering collaboration with corporations, government agencies, academic institutions, training organizations and consulting firms. These partnerships have enabled IPMA to create and disseminate globally recognized competence standards. Through these standards, project management professionals from diverse cultures and regions are empowered to learn, grow and drive progress for their organisations and stakeholders.

This commitment to advancing the field is embodied in the Planning Competences - ICB4 Reference Guide. Derived from the comprehensive IPMA Individual Competence Baseline (ICB4), it serves as a pivotal resource for Project Planning Professionals. It focuses on equipping them with the competences necessary for their critical role in collaborating with Project Managers to achieve project success. Far from being a traditional manual on Project Management, this Guide addresses the specific needs of Project Planning Professionals. It offers a pathway to acquire the knowledge, skills and abilities required to excel in their roles, advancing both their careers and the discipline as a whole.

The creation of this Guide is a testament to the dedication of a global community of experts. IPMA extends its heartfelt gratitude to the editorial team and contributors from around the world, whose invaluable feedback enriched every stage of this Guide's development. The collaborative efforts across vast distances and multiple time zones stand as a shining example of what can be achieved through shared vision and teamwork.

As you engage with this Guide, we invite you to join us in celebrating not only IPMA's storied past but also its vibrant present and promising future. Together, we continue to elevate the practice of Project Management, fostering a community where learning, sharing and collaboration are at the forefront of progress.

Signatures:



Agnes Roux-Kiener, Editor of the Project Planner, ICB4 Reference Guide  
Jose Reyes, IPMA VP Standards, Qualifications & Products  
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# Introduction

This document is derived from the IPMA Individual Competence Baseline (ICB4) that is a global Standard for Project Management. Just like in ICB4, Project Planning competencies are structured into three competence categories:

- The Perspective competencies dealing with the context and the environment of a project
- The People competencies dealing with personal behaviours and social topics
- The Practice competencies dealing with the construction and management of a project plan

This document covers the Perspective competences and their key competence indicators. These are the same as for Project managers (refer to ICB4) but their descriptions are tailored for Project Planning managers in order to help them understand the relevance of these competencies for their profession.

The five Perspective competence elements are described first in this document and are numbered from 1.1 to 1.5 (these numbers are also used in the Project Planner self-assessment document).

- 1.1 Strategy
- 1.2 Governance, Structure and Process
- 1.3 Compliance, Standards and Regulations
- 1.4 Power and Interest
- 1.5 Culture and Values

For People competences, as all people working on projects should be driven by the same behavioural competencies, the competencies described in the ICB4 will be used. Free download of the IPMA ICB4 document is available through this page (click on download eBook): <https://shop.ipma.world/shop/ipma-standards/books-ipma-standards/individual-competence-baseline-for-project-management/?v=11aedd0e4327>

The 10 People competence elements included in ICB4 are numbered from 4.4.1 to 4.4.10 in ICB4 and from 2.1 to 2.10 in the Planner self-assessment document:

- 2.1 Self-Reflection and Self-Management
- 2.2 Personal Integrity and Reliability
- 2.3 Personal Communication
- 2.4 Relationships and Engagement
- 2.5 Leadership
- 2.6 Teamwork
- 2.7 Conflicts and Crises
- 2.8 Resourcefulness
- 2.9 Negotiation
- 2.10 Results orientation

This document also includes Practice competencies that have been tailored to the planning profession. The 13 Practice competence elements for planning are described in second part of this document and are numbered from 3.1 to 3.13 (numbers also used in the Project Planner self-assessment document).

- 3.1 Project Planning Design and Requirements
- 3.2 Project Planning Organisation, Information and Communication
- 3.3 Contracts and Project Delays
- 3.4 Project Scope, Deliverables and Structure
- 3.5 Project Scheduling
- 3.6 Project Time and Milestone Management
- 3.7 Project Resource Allocation
- 3.8 Project Resource Optimization
- 3.9 Monitoring Project Progress
- 3.10 Planning Risks and Opportunities
- 3.11 Planning Steering and Control
- 3.12 Planning Stakeholders
- 3.13 Change / Transformation Management

In this document, for each competence element there are:

- a definition, a purpose and a description together with knowledge and skills / abilities related to this competence.
- Key Competence Indicators (KCIs) with measures so that the level of a competence of a candidate might be assessed.

This document is a reference guide for candidates who would like to develop themselves in the project planning profession. It is not a prescriptive cookbook.

# Glossary of terms

**Baseline plan:** project plan approved (contracted). Progress of project execution is measured against baseline plan.

**PBS - Product Breakdown Structure:** tree shape identification of all products (both final and intermediate) and components to be produced and/or used in the project.

**Plan:** Description of project execution (identification of work items - work packages, activities, tasks -, project logic - links or logical relationships between identified work packages, activities and tasks -, project organisation - identification of contributors, contributions, as well as material and machine resources, project schedule and related resource profiles).

**Planning:** construction of the project plan (from system design to baseline plan). Planning consists in collecting data from relevant sources, analysing those and consolidating them, negotiating all adjustment needed to assure the consistency of the project plan.

**RBS - Resource Breakdown Structure:** tree-shaped identification of all resources (human, material and machines) contributing to the project, used during the project, and possibly generated during the project.

**Schedule:** project timeline consistent with other components of the project plan (identification of work items, logics, organisation and estimates).

**Scheduling:** construction of the project schedule. Scheduling consists of collecting data from relevant sources, analysing those and consolidating them, negotiating all adjustments needed to assure consistency of the project schedule with estimates, execution assumptions and uncertainties.

**WBS - Work Breakdown Structure:** tree-shaped identification of all subproject, phases, stages, work packages, activities and tasks of the project.



# 1 Perspective Competence Elements for Project Planning

The perspective competence elements deal with the framework within which project planning is implemented. They are the same as in the ICB4 document but this part explains their relevance to project planners.

The five perspective competencies are:

- Strategy
- Governance, Structure and Process
- Compliance, Standards and Regulation
- Power and Interest
- Culture and Values

## 1.1 Strategy

### Definition

This competence element describes how planning strategies are understood and transformed for a smooth execution of the project. This is therefore about defining a performance planning management system in line with the organisation's planning strategy and vision. This ensures it is highly correlated with the mission and the sustainability of the organisation.

### Purpose

The purpose of this competence element is to understand the planning strategy and strategic processes, thus enabling project, programme or portfolio to manage their project planning within the contextual aspects.

### Description

This competence describes the formal justification of the project's planning goals as well as the realization of benefits for the Organisation's long-term planning goals.