PM² Essentials Training Material
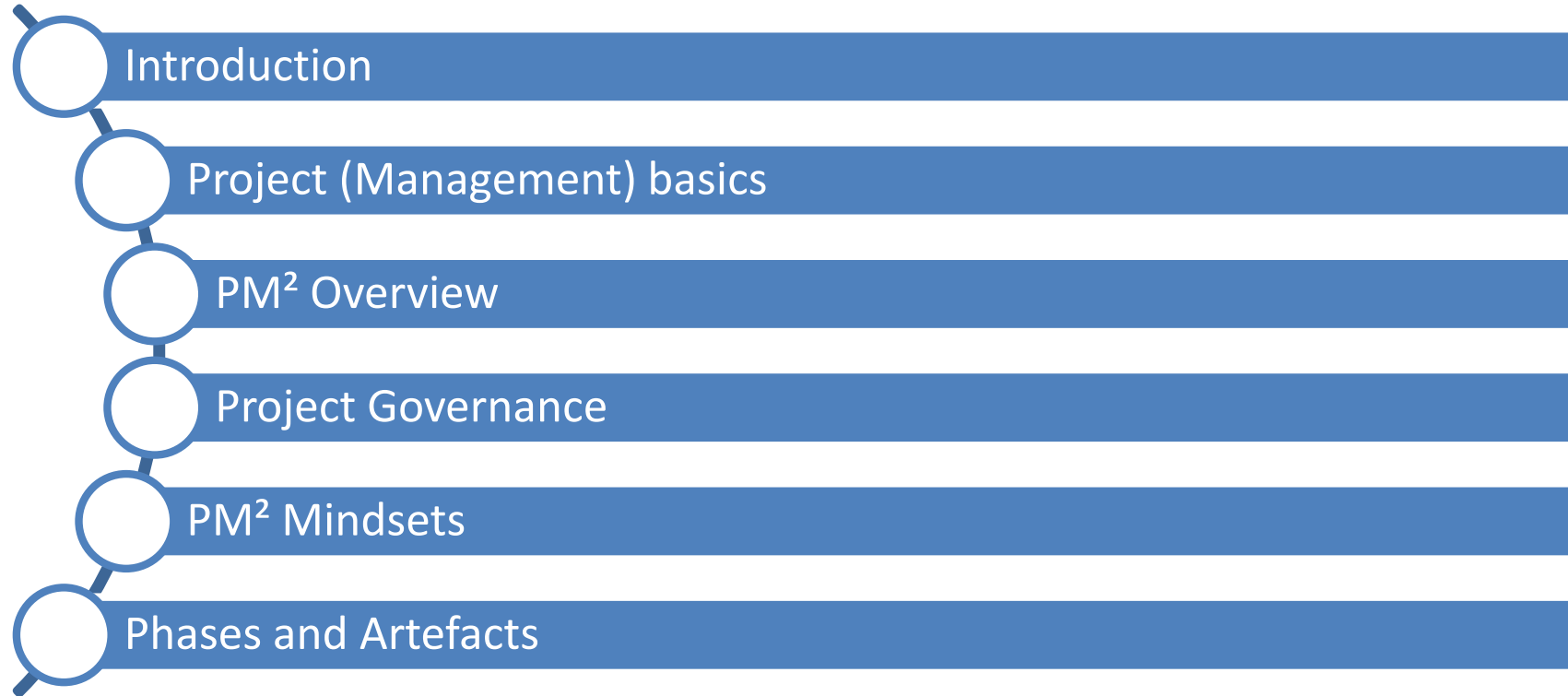
Based on PM² v3.1

Copyright

Introduction

The European Commission's
Project Management Methodology

This course introduces the PM² Methodology of the European Commission.

It enables participants to:

– obtain the foundation knowledge necessary for using effectively the PM² Project Management Methodology.

– understand the full PM² project life cycle, organisation, roles & responsibilities.

– understand the PM² Mindsets.

– Familiarise themselves with the key PM² Artefacts for initiating, planning, executing, controlling and closing projects.

Course Content

- Introduction
- Project (Management) basics
- PM² Overview
- Project Governance
- PM² Mindsets
- Phases and Artefacts

Suggested Course Schedule

Session 1

- 09:00 **Kick-off**
- 09:15 Project (Management) Basics
- 10:30 Introduction to PM²
- 11:00 **Break**
- 11:15 Governance of Projects
- 11:45 PM² Mindsets
- 12:00 Initiating Phase
- 12:30 **Lunch**

Session 2

- 13:30 Planning Phase
- 14:00 Executing Phase
- 14:30 Monitor & Control
- 15:15 **Break**
- 15:30 Monitor & Control (cont'd)
- 16:15 Closing Phase
- 16:45 **Wrap-up**
- 17:00 **End course**

Contact the Methodology Office

European Commission
DG for Digital Services
DIGIT A2.001 – Procurement & Programme Management Solutions
Methodologies Office

**Contacts:**
Email: EC-Methodologies@ec.europa.eu
Website: pm2.europa.eu
JoinUp: joinup.ec.europa.eu

Project (management) Basics
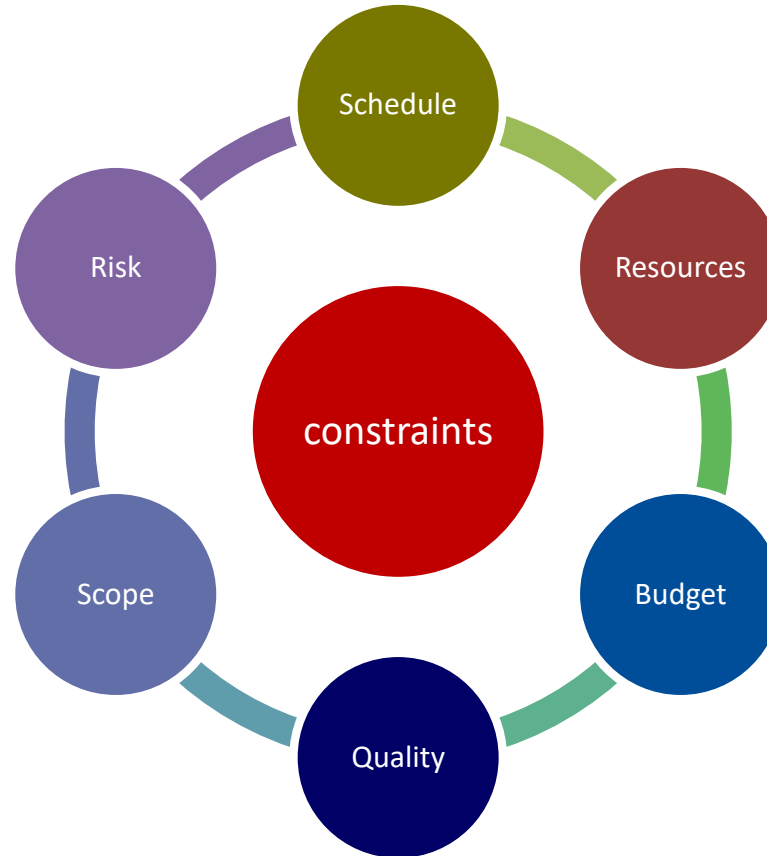
What is a Project?

A project is a temporary organisation which is set up to create a unique output (product or service). A project is defined by its unique scope, time, cost, and quality objectives.

Temporary	Unique	Output	Constraints
Start & End	Non routine	Product or Service	Scheduling, Budgeting, Quality...
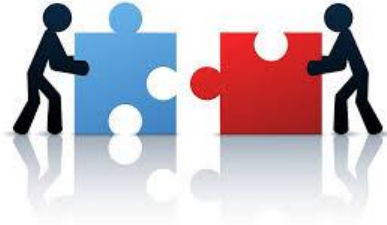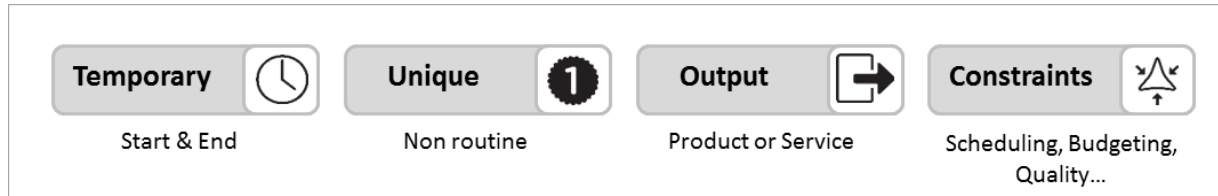
Constraints of a Project

Project Outputs, Outcomes, Benefits

Project deliverables or outputs are merely a means to an end.

The real purpose of a project is to achieve given outcomes that will yield measurable benefits.

Note that project outcomes and benefits are often realised only after the project has closed.

Why do we do Projects?

- Projects deliver Outputs (deliverables) that deliver a change (social, commercial, operational, etc.)
- These changes generate outcomes for the beneficiaries or users.
- On the long term these outcomes produce benefits or impact.
- These benefits realise or support the organisation strategy.

Outputs

Changes

Outcomes

Benefits/Impact
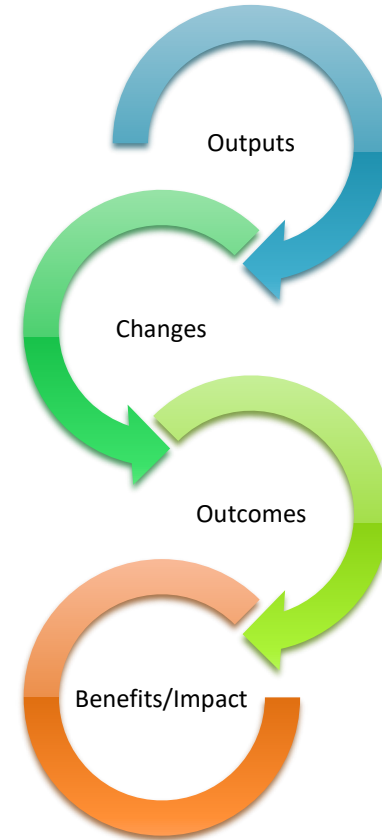
Portfolio, Programme, Project Relationship
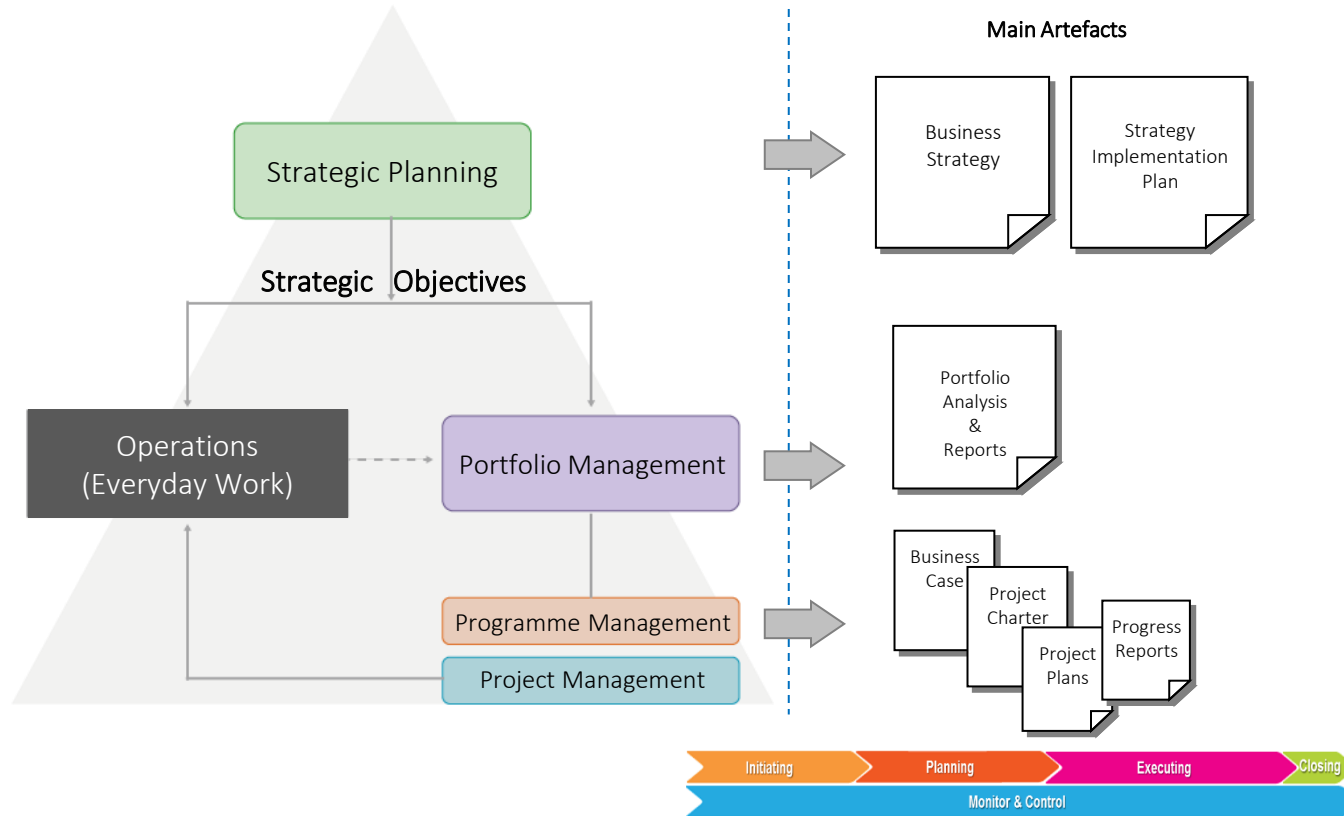
Examples of Projects

- Projects are undertaken at all levels of the organisation and they can involve 2-3 persons or many thousands.
- Their duration ranges from 4-5 weeks to several years. Projects can involve one or many organisational units.

- Developing a new product or service
- Effecting a change in structure, staffing, or style of an organization
- Designing a new transportation vehicle
- Developing, modifying or acquiring a new information system
- Constructing a building or facility
- Building a water system for a community
- Running a campaign for political office
- Implementing a new business procedure or process
- Responding to a contract solicitation.

Competences

People Competences	Perspective Competences
• Self-reflection and self-management • Personal integrity and reliability • Personal communication • Relationships and engagement • Leadership • Teamwork • Conflict and crisis management • Resourcefulness • Negotiation • Results orientation	• Strategy • Governance, structures and processes • Compliance, standards and regulations • Power and interest • Change and transformation • Culture and values *Source: IPMA-ICB (adapted)*

PM² Overview

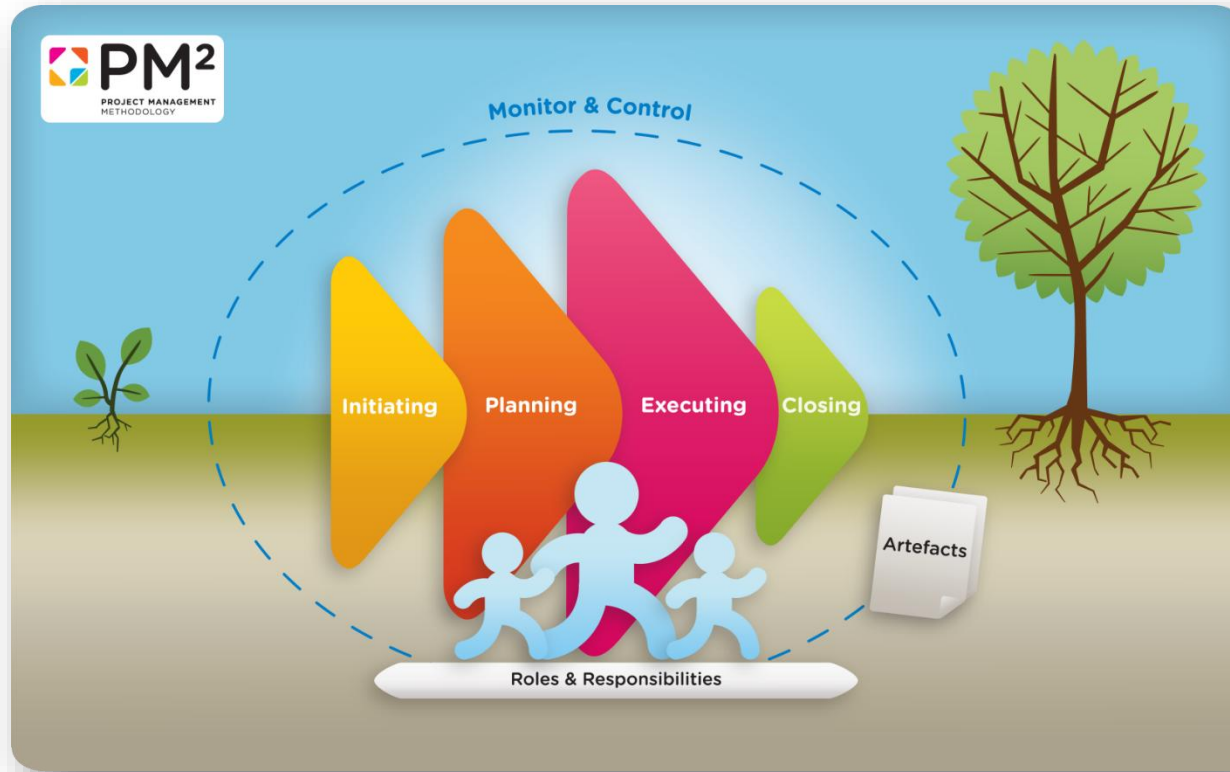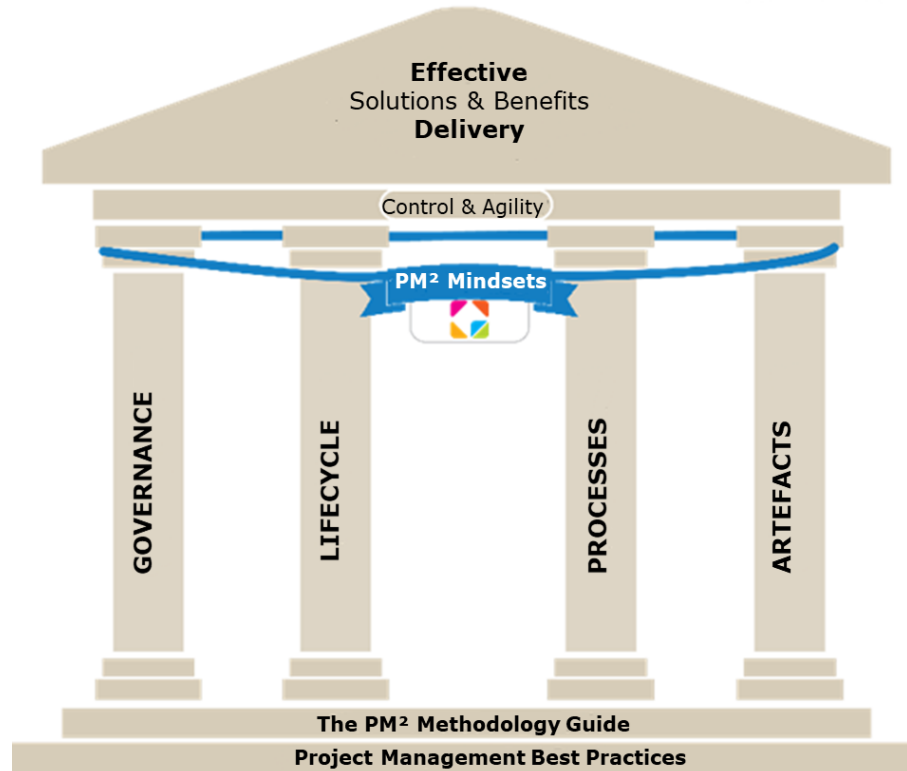The purpose of PM² is to enable Project Managers to deliver solutions and benefits to their organisations by effectively managing the entire lifecycle of their project

The PM² Methodology

The House of PM²

PM² Mindsets

The PM² Mindsets enable us to apply the Methodology more effectively and help us navigate through the complexities of project reality.

PM²
Processes
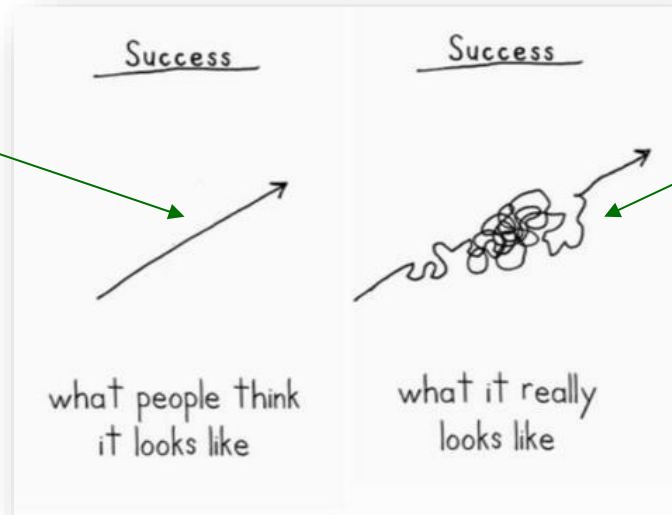
PM²
Processes & Mindsets
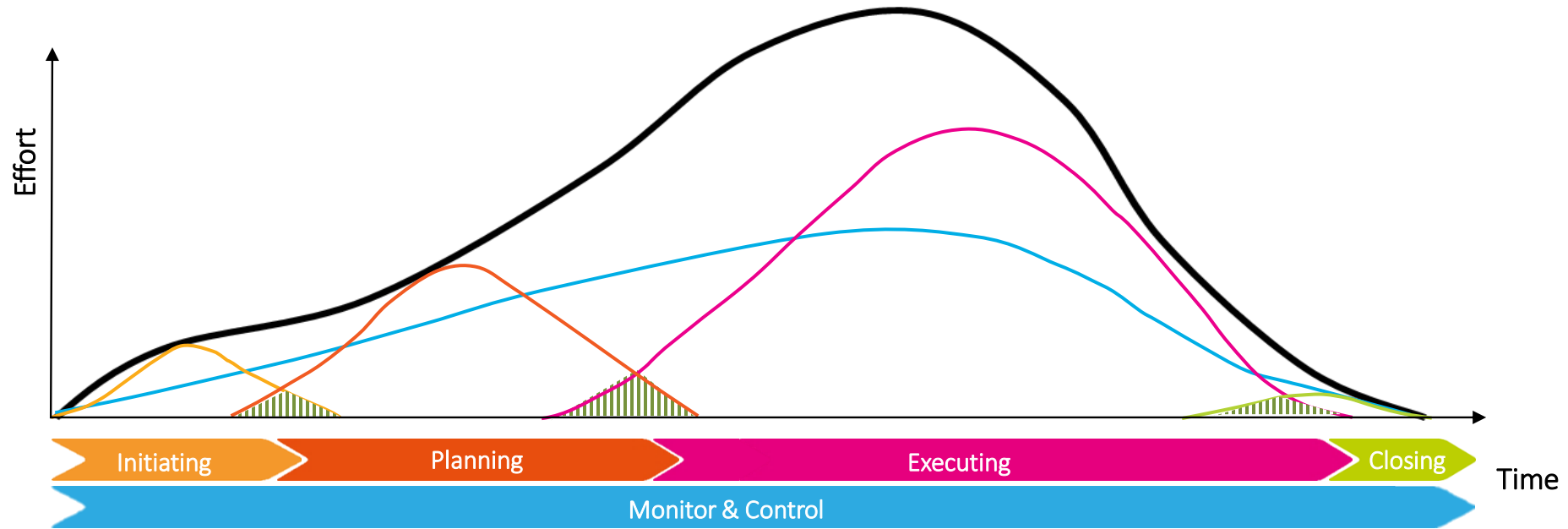
PM² Phases

	PM² Phases	Description
1	Initiating	Get the project off to a good start.
2	Planning	Define deliverables, verify the Business Case, plan work, etc.
3	Executing	Create the project's deliverables.
4	Closing	Deliverables validation, lessons learnt, project closure.
	Monitor & Control:	The Project Manager (PM) monitors & controls the work, risks, issues, quality, etc. throughout the whole project lifecycle.

PM² Project Lifecycle - Phases & Drivers

Phase Gates / Approvals
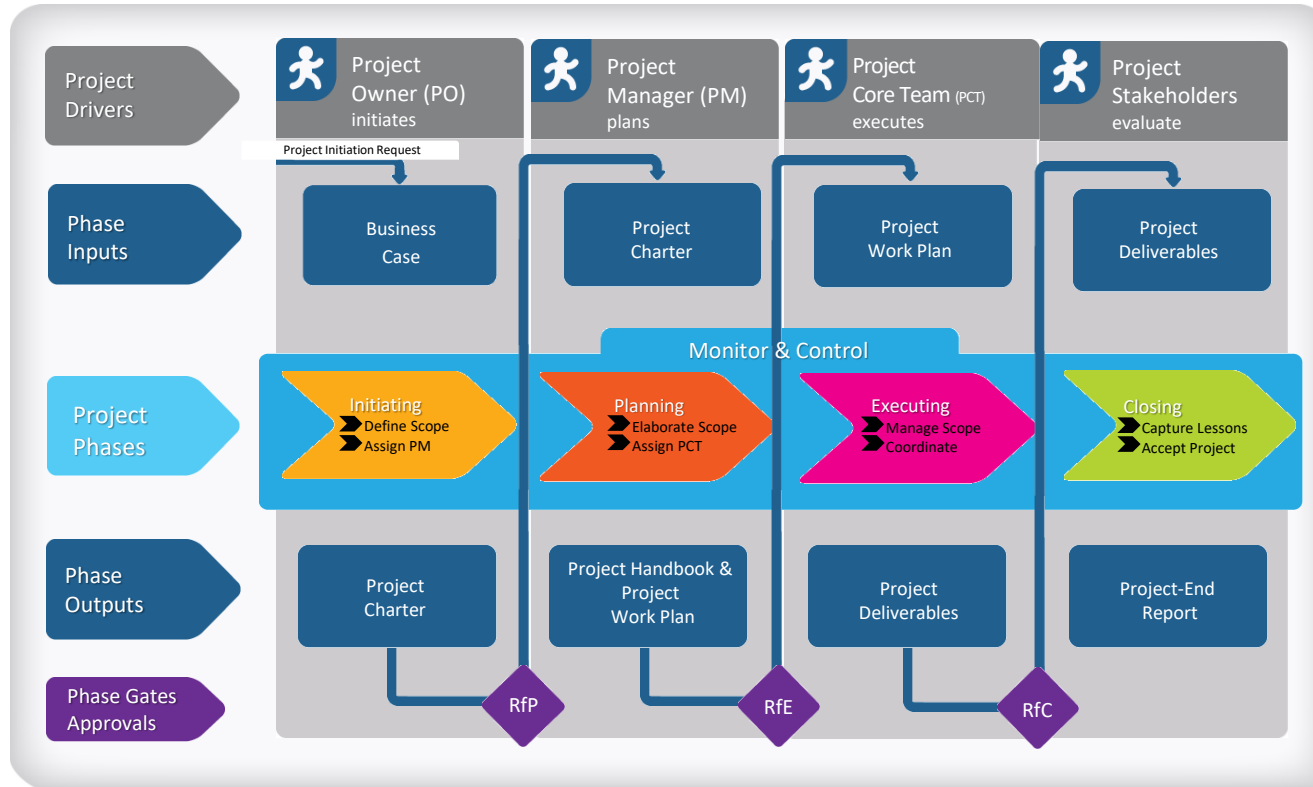
- These check points contribute to the overall project management quality.

- The three PM² (approval) Phase Gates are:
  - RfP (Ready for Planning): At the end of the Initiating Phase
  - RfE (Ready for Executing): At the end of the Planning Phase
  - RfC (Ready for Closing): At the end of the Executing Phase

PM² Phases & Activities & Artefacts

Activities

Initiating
- Document the idea/need
- Identify key stakeholders (and their needs)
- Create a business justification for the project
- Define the project scope and organisation

Planning
- Organise a Kick-off Meeting
- Tailor the PM² process
- Assign roles & responsibilities
- Elaborate project scope
- Develop work breakdown & project schedule
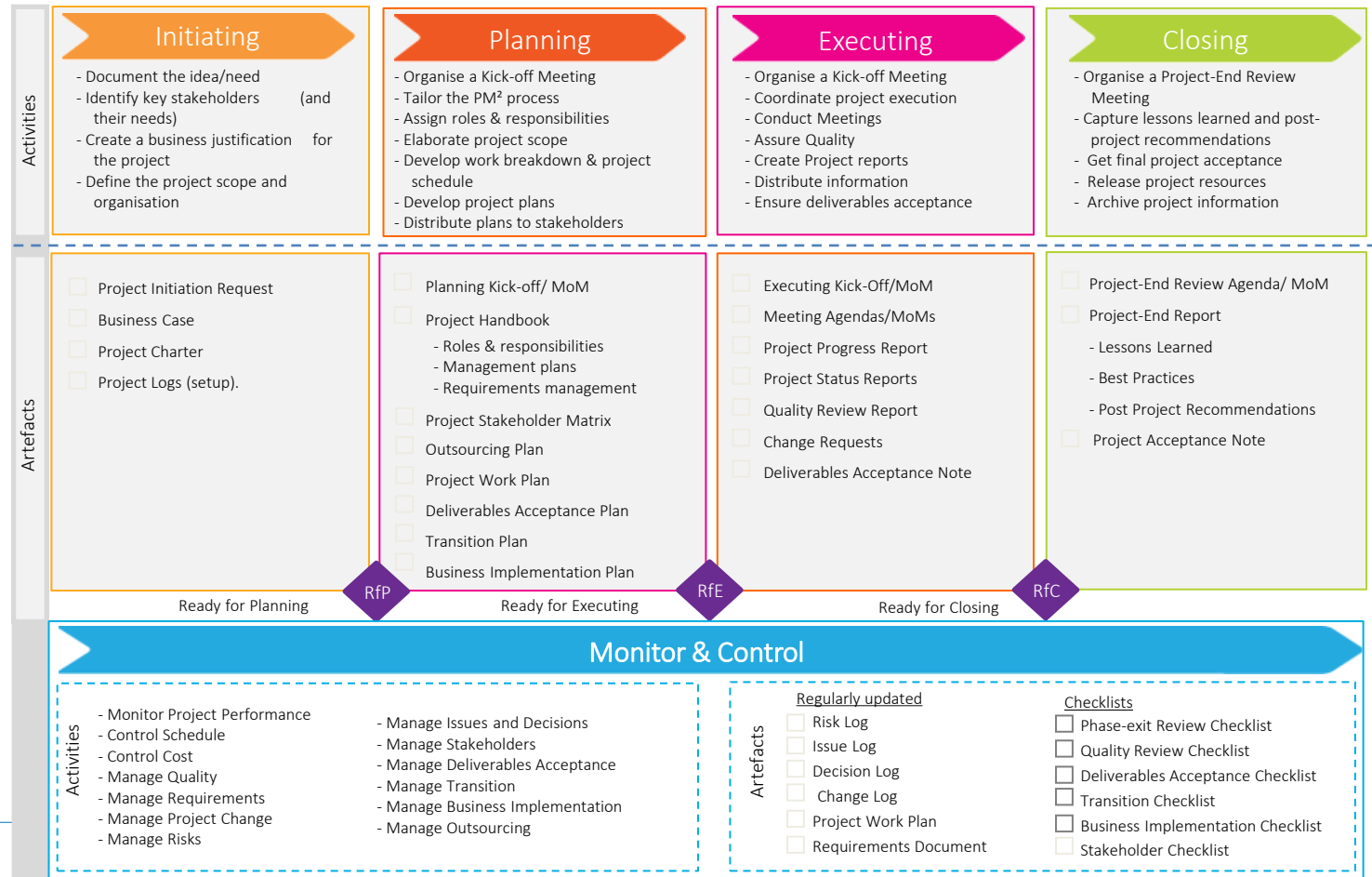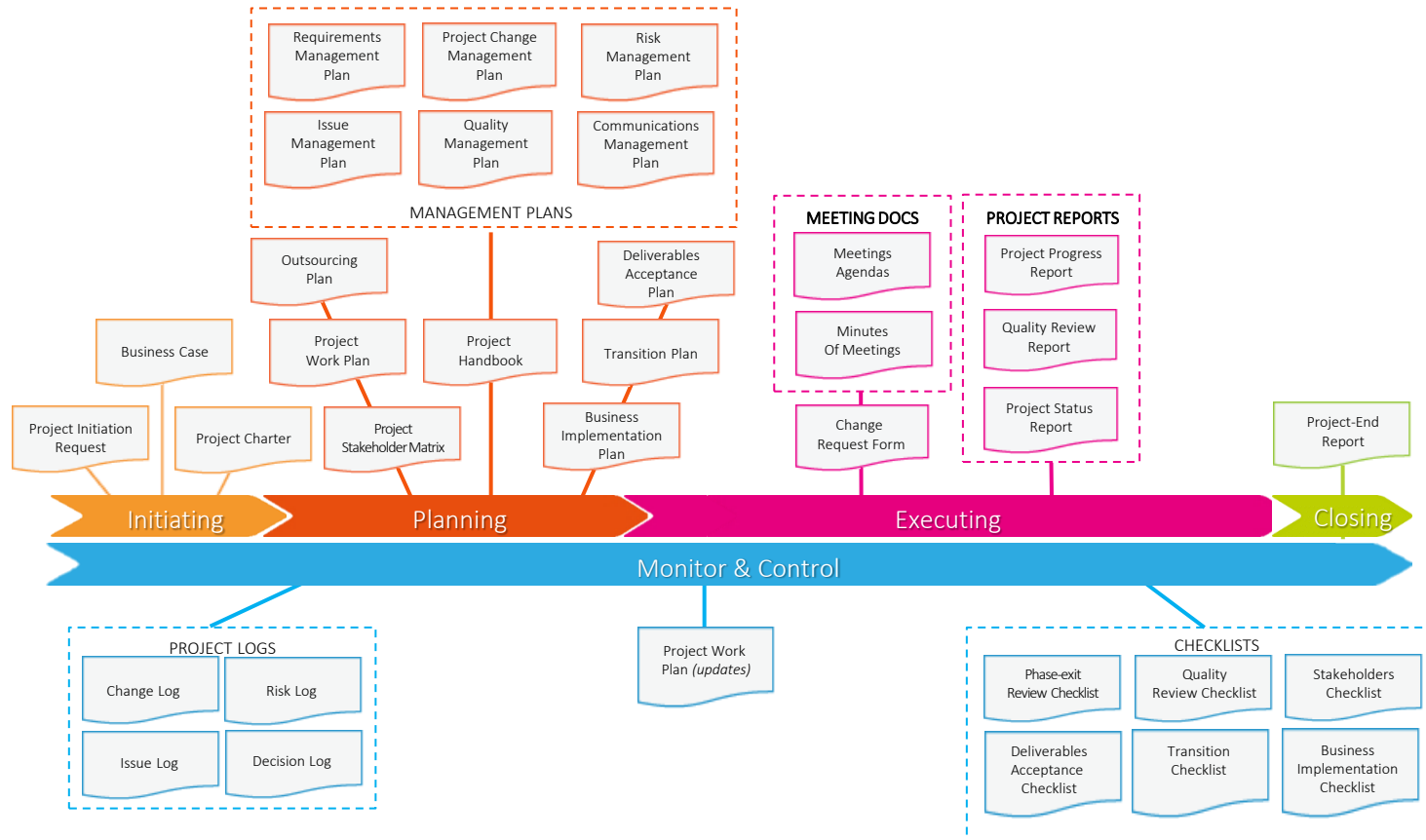- Develop project plans
- Distribute plans to stakeholders

Executing
- Organise a Kick-off Meeting
- Coordinate project execution
- Conduct Meetings
- Assure Quality
- Create Project reports
- Distribute information
- Ensure deliverables acceptance

Closing
- Organise a Project-End Review Meeting
- Capture lessons learned and post-project recommendations
- Get final project acceptance
- Release project resources
- Archive project information

Artefacts

Initiating
- [ ] Project Initiation Request
- [ ] Business Case
- [ ] Project Charter
- [ ] Project Logs (setup).

Planning
- [ ] Planning Kick-off/ MoM
- [ ] Project Handbook
  - Roles & responsibilities
  - Management plans
  - Requirements management
- [ ] Project Stakeholder Matrix
- [ ] Outsourcing Plan
- [ ] Project Work Plan
- [ ] Deliverables Acceptance Plan
- [ ] Transition Plan
- [ ] Business Implementation Plan

Executing
- [ ] Executing Kick-Off/MoM
- [ ] Meeting Agendas/MoMs
- [ ] Project Progress Report
- [ ] Project Status Reports
- [ ] Quality Review Report
- [ ] Change Requests
- [ ] Deliverables Acceptance Note

Closing
- [ ] Project-End Review Agenda/ MoM
- [ ] Project-End Report
  - Lessons Learned
  - Best Practices
  - Post Project Recommendations
- [ ] Project Acceptance Note

RfP — Ready for Planning
RfE — Ready for Executing
RfC — Ready for Closing

Monitor & Control

Activities
- Monitor Project Performance
- Control Schedule
- Control Cost
- Manage Quality
- Manage Requirements
- Manage Project Change
- Manage Risks
- Manage Issues and Decisions
- Manage Stakeholders
- Manage Deliverables Acceptance
- Manage Transition
- Manage Business Implementation
- Manage Outsourcing

Artefacts

Regularly updated
- [ ] Risk Log
- [ ] Issue Log
- [ ] Decision Log
- [ ] Change Log
- [ ] Project Work Plan
- [ ] Requirements Document

Checklists
- [ ] Phase-exit Review Checklist
- [ ] Quality Review Checklist
- [ ] Deliverables Acceptance Checklist
- [ ] Transition Checklist
- [ ] Business Implementation Checklist
- [ ] Stakeholder Checklist

The PM² Artefacts Landscape

MANAGEMENT PLANS
- Requirements Management Plan
- Project Change Management Plan
- Risk Management Plan
- Issue Management Plan
- Quality Management Plan
- Communications Management Plan

- Outsourcing Plan
- Deliverables Acceptance Plan
- Business Case
- Project Work Plan
- Project Handbook
- Transition Plan
- Project Initiation Request
- Project Charter
- Project Stakeholder Matrix
- Business Implementation Plan

MEETING DOCS
- Meetings Agendas
- Minutes Of Meetings
- Change Request Form

PROJECT REPORTS
- Project Progress Report
- Quality Review Report
- Project Status Report

- Project-End Report

Initiating | **Planning** | **Executing** | **Closing**

Monitor & Control

PROJECT LOGS
- Change Log
- Risk Log
- Issue Log
- Decision Log

Project Work Plan *(updates)*

CHECKLISTS
- Phase-exit Review Checklist
- Quality Review Checklist
- Stakeholders Checklist
- Deliverables Acceptance Checklist
- Transition Checklist
- Business Implementation Checklist

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PM²

Tailoring

- First, understand purpose and value of the PM² methodology
- Don't cut, but customise
- Balance control gained against effort required
- Eliminate waste, but respect the integrity of the method

The purpose of documentation is to…

- Help people think something through
- Provide a clear picture of the project requirements.
- Facilitate communication.
- Facilitate agreement by all project stakeholders.
- Offer a baseline for the monitoring & controlling.
- Document important decisions made (and track changes).
- Respond to Audit requirements.
- Integrate new-team members.
- Support organizational memory.
- Support maintenance

The Expanding Reach of PM²

PM² v1.0
DIGIT
(IT Projects)

PM² v2.0
European
Commission

PM² v2.5
European
Institutions

EU Agencies

European Council

European Financial
Institutions

Open PM²
v1.0

EU Member
States

EU Grants
Beneficiaries

EU
Contractors

Public
Sector

Private Sector

V3.1
European
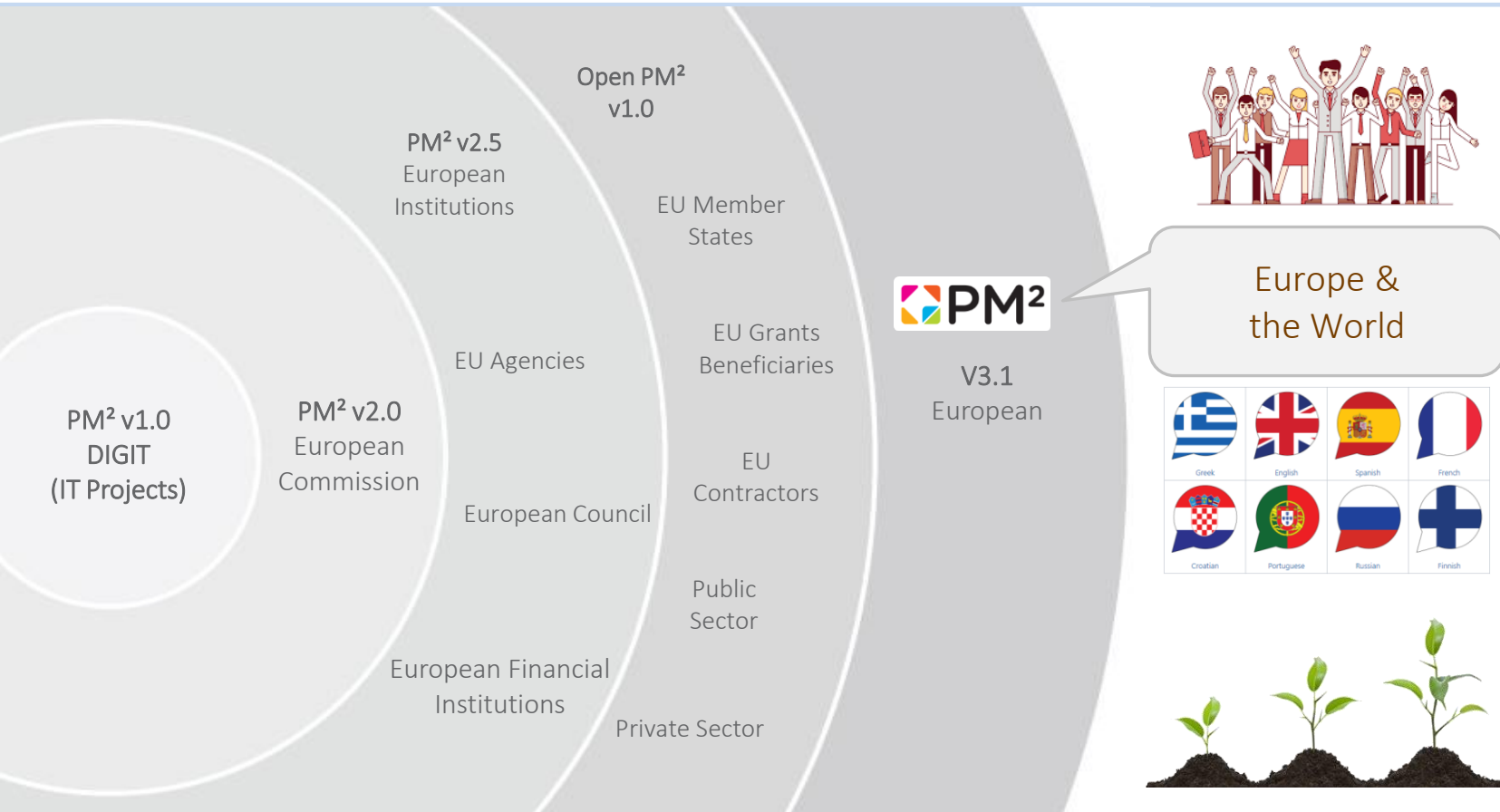
Europe &
the World

The PM² Project Management Methodology Guide & Artefacts v3.1

AVAILABLE via Web: https://pm2.europa.eu/index_en

Project Governance

A PM² Project

- Is (above all) a project (i.e. not operations, not a work activity, not a programme etc.).
- has a duration of more than 4–5 weeks and involves more than 2–3 people.
- runs within an organisation and can be subject to internal or external audits.
- requires a clearly defined governance structure and clearly assigned roles and responsibilities.
- requires approval of its budget and scope.
- includes more than just construction/delivery activities.

- includes transition and business implementation activities.
- requires a certain level of documentation, transparency and reporting.
- requires a certain level of control and traceability.
- has a broad base of internal (and external) stakeholders.
- may require the collaboration of several organisations or organisational units.
- Contributes to raising the organisation's project management maturity.

The PM² Governance Model
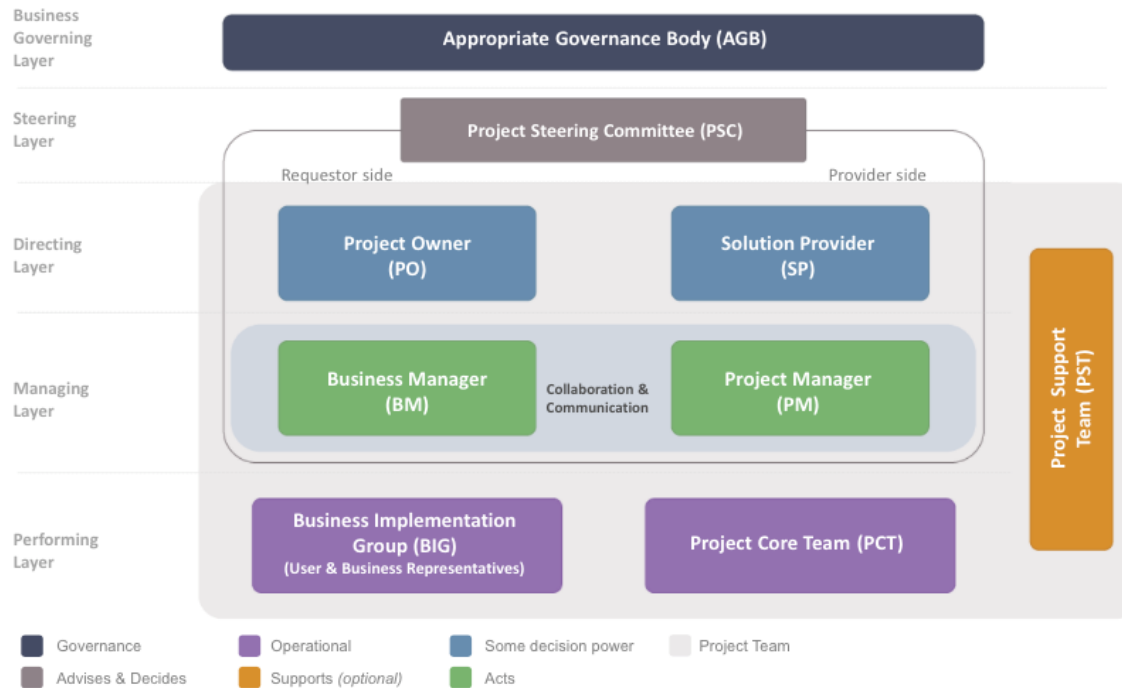
The Project Owner (PO) Role

- Acts as the project sponsor, promotes the project's success
- Provides leadership and strategic direction
- Chairs the Project Steering Committee (PSC)
- Accepts the business objectives
- Coordinates the resolution of escalated issues and conflicts
- Monitors project progress regularly *(high level)*
- Mobilises resources (a.k.a. budget)
- Assures that project outcomes are in line with the business objectives
- Drives organisational change and monitors proper evolution and change implementation
- Approves all key management Artefacts
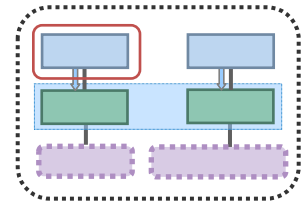
The Solution Provider (SP) Role

- Assumes the overall accountability for project deliverables/services requested by the Project Owner (PO)

- Represents the interests of those designing, developing, facilitating, procuring, implementing,
and possibly operating and maintaining the project outputs (e.g. IT System)

- Agrees on objectives for the provider activities and approves the deliverables for the project

- Mobilises the needed resources from the provider side and appoints the PM

- Approves the objectives of any outsourced activities and deliverables and becomes accountable for the contractor's performance
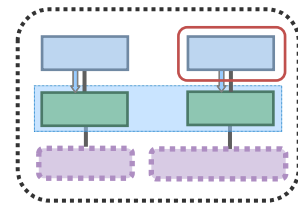
The Business Manager (BM) Role

- Acts on a daily basis on behalf of the Project Owner (PO)
- Guarantees cooperation and an efficient communication channel with the Project Manager (PM)
- Drives the definition of business and project objectives
- Manages the activities on the business side of the project and ensures that the required business resources are made available
- Coordinates the Business Implementation Group (BIG) and acts as a liaison between the User Representatives (URs) and the provider organisation
- Ensures that the project outputs produce the expected results (outcomes and benefits)
- Ensures that the client organisation is ready to accommodate and use the final project outputs
- Leads the implementation of the business changes within the user community
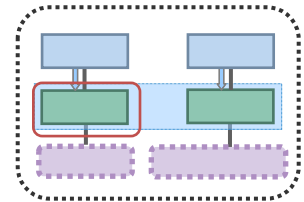
The Project Manager (PM) Role

- Executes the project plans as approved by the Project Steering Committee (PSC)
- Daily manages and coordinates the Project Core Team (PCT) activities and resources
- Ensures that project objectives are achieved within the quality, time, and cost objectives
- Manages stakeholder's expectations
- Ensures that all key management artefacts are delivered and approved by the Project Owner (PO) or the Project Steering Committee (PSC)
- Ensures the controlled evolution of delivered outputs, through proper change management
- Performs risk management activities for project-related risks
- Escalates unresolvable project issues to the Project Steering Committee (PSC).
- Monitors and reports project status and progress to the Project Steering Committee (PSC)
- Liaises between the Directing and Performing Layers of the project

Project Steering Committee (PSC)

PM² Artefacts & Activities
Overview RAM (RASCI)

Project Steering Committee:
accountable for the Project Work Plan?

Project Owner:
almost full accountability

Project Manager:
does the work but is NOT accountable
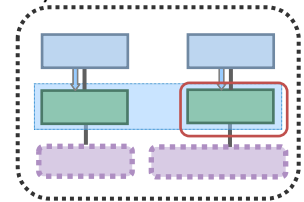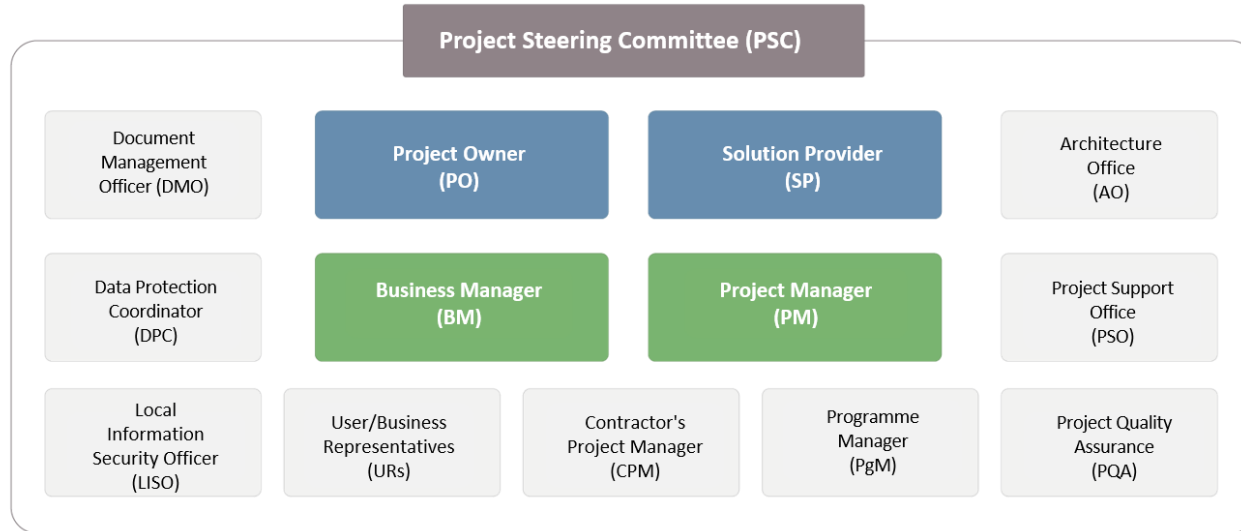
Initiating	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Initiation Request	I	n.a.	A/S	R	S/C	I	n.a.	n.a.
Business Case	I	C	A	R	C	S	S	n.a.
Project Charter	I	A	C	S	C	S	R	C
Planning	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Planning Kick-off Meeting	I	A	C	S	C	C	R	C
Project Handbook	I	I	A	S	C	I	R	C
Project Work Plan	I	A	C	S/C	C	C	R	S/C
Deliverables Acceptance Plan	I	A	C	S		C	R	C
Transition Plan	I	A	C	C	C		R	C
Business Implementation Plan	I	I	A	R	C	I		I
Management Plans								
Requirements Management Plan	I	I	A	C	C	I	R	S
Project Change Management Plan	I	I	A	C	I	I	R	I
Risk Management Plan	I	C	A	C	I	I	R	I
Issue Management Plan	I	I	A	C	C	I	R	C
Quality Management Plan	I	A	C	C	C	C	R	
Communications Management Plan	I	I	A	S	C	I	R	C
Executing	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Executing Kick-off Meeting	I	A	C	S/C	C	C	R	C
Project Coordination	I	I	A	S	I	I	R	I
Quality Assurance	I	I	I	S	C	I	A	R
Project Reporting	I	I	A	S/C	I/C	I/C	R	C
Information Distribution	I	I	A	C	I	I	R	C
Monitor & Control	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Monitor Project Performance	I	I	A	C	C	I	R	C
Control Schedule	I	I	A	C	C	I	R	C
Control Cost	I	I	A	C	C	I	R	C
Manage Stakeholders	I	I	A	S/C	I	C	R	I
Manage Requirements	I	I	A	C	C	I	R	S
Manage Project Changes	I	C	A	S	I	I	R	C
Manage Risks	I	C	A	S/C	C	I	R	C
Manage Issues & Decisions	I	I	A	S	C	I	R	C
Manage Quality	I	I	I	S/C	C	A	R	C
Manage Deliverables Acceptance	I	I	A	S	C	C	R	C
Manage Business Implementation	I	I	A	R	C	I	S	I
Manage Transition	I	A	C	C	C	C	R	C
Manage Outsourcing	A	C	C	C	I	S	R	I
Closing	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project-End Review Meeting	I	A	C	S	C	C	R	C
Project-End Report	I	A	C	S	C	C	R	C
Administrative Closure	I	C	A	C	I	C	R	I

Summary – Roles & Responsibilities

- The PM² Governance – Roles & Responsibilities

- The Project Steering Committee (PSC)

- The Project Core Team (PCT)

- Differences between Project Mode and Service Mode

- The Responsibility Assignment Matrix - RAM (RASCI)

PM^2 Mindsets

The PM² Mindsets

The PM² Mindsets are reminders of effective behaviors and attitudes. They provide a common set of beliefs and values for all PM² teams, helping them navigate through the complexities of project reality.

Apply PM² best practices to manage their projects.

Remain mindful that PM methodologies are there to serve projects and not the other way around.

Balance in the most productive way the often-conflicting project management "Ps" of:
product, purpose, process, plan, people, pleasure/pain, participation, perception and politics.

Maintain an outcomes orientation in relation to all projects and project management activities.

Invest in developing technical and behavioural competences to become better project contributors.

Are committed to delivering project results with maximum value rather than just following plans.

Involve project stakeholders in the organisational change needed to maximise project benefits.

Foster a project culture of collaboration, clear communication and accountability.

Share knowledge, actively manage Lessons Learned, and contribute to the improvement of project management within their organisations.

Assign project roles to the most appropriate people for the benefit of the project.

Draw inspiration from the PM² Guidelines on Ethics and Professional Virtues.

Methodologies Office

PM²

PM² Mindsets: IAQs (Questions for the Brave!)

Project Managers and Project Teams who practice PM² also ask the important questions:

- **Do we know what we are doing?**
  - Tip: Develop a clear and shared project vision. Manage the project using a holistic approach and optimise the whole project, not just parts of it. Follow a process but stay Agile and try to regularly remind yourself why you are doing something.

- **Do we know why we are doing it? Does anyone really care?**
  - Tip: Make sure your project matters. Understand its goals, value and impact, and how it relates to the organisational strategy. Define upfront what project success is and deliver maximum value and real benefits, not just outputs.

- **Are the right people involved?**
  - Tip: People make projects work. The primary criterion for involving people and assigning project roles should be to serve the needs and objectives of the project, and not politics, friendship, functional hierarchy, proximity or convenience.

- **Do we know who is doing what?**
  - Tip: Know what you should be doing, and make sure others know what they should be doing. Is it clear to everyone? Clearly define and understand roles, responsibilities and accountabilities.

- **Deliver at any cost or risk?**
  - Tip: Show respect for people's work and organisational funds and avoid high-risk behavior and tactics. Always keep in mind that it is not just about the end result – how you get there also matters. Manage your projects based on positive values and principles.

PM² Mindsets: IAQs (Questions for the Brave!)

... and continue asking important questions:

- **Is this important?**
  - Tip: Everything is NOT equally important. Identify, and agree on, the project's Critical Success Criteria (CSC), Minimum Viable Product and Critical Success Factors (CSFs), and allocate effort and attention both tactically and strategically for the benefit of both the project and project management goals.

- **Is this a task for "them" or for "us"?**
  - Tip: Make sure that client and provider groups work as one team towards a common goal. Real teamwork really works; so foster clear, effective and frequent communication.

- **Should I be involved?**
  - Tip: Contribute from any position. Be proud of the skills, value and positive attitude you bring to the project. Help everyone who needs to be involved get involved. Promote and facilitate the contributions of all stakeholders.

- **Have we improved?**
  - Tip: Commit to ongoing self- and organisational improvement by gathering and sharing knowledge. Project teams should reflect on how they can become more effective and adjust their behavior accordingly.

- **Is there life after the project?**
  - Tip: The product (or service) lifecycle has just begun!
    Make sure you have contributed to its success.

Bringing it all Together: Processes + Mindsets

Help us make decisions on trade-offs between project dimensions of time, cost, scope and quality

PM^2
Processes & Artefacts

The attitudes and behaviours which help us focus on what is really important in achieving our project goals

PM^2
Mindsets

Together

They help us navigate the complexities of managing projects in organisations and make PM² both more effective and complete

Phases and Artefacts

Initiating Phase

Client need → Project Initiation Request → Business Case → Project Charter

Artefacts

Initiating	Planning	Executing	Closing
Project Initiation Request Business Case Project Charter Project Logs (setup)			

RfP

Ready for Planning

Monitor & Control
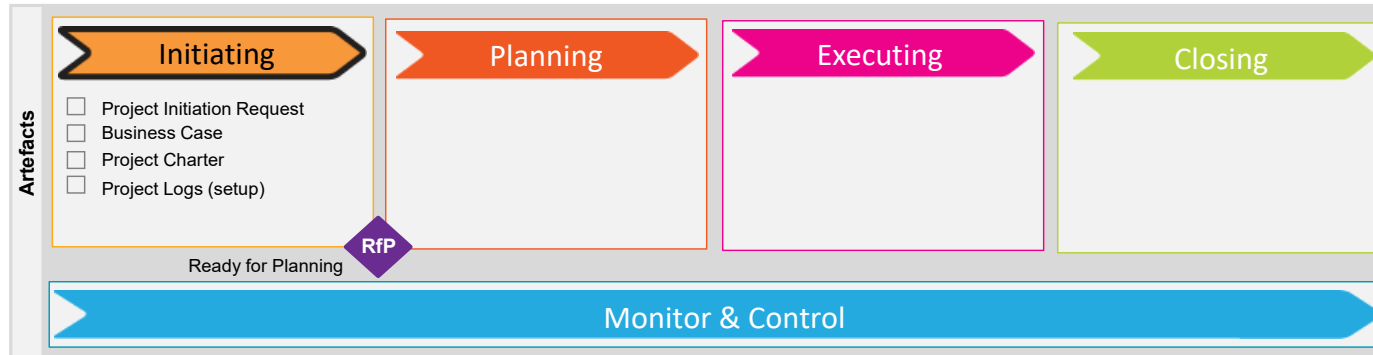
What happens in the Initiating Phase?

Idea / Need

Document the idea/need → Project Initiation Request

Identify key stakeholders (and their needs)

Create a business justification for the project → Business Case

Define the project scope & organisation → Project Charter

RfP (Ready for Planning)
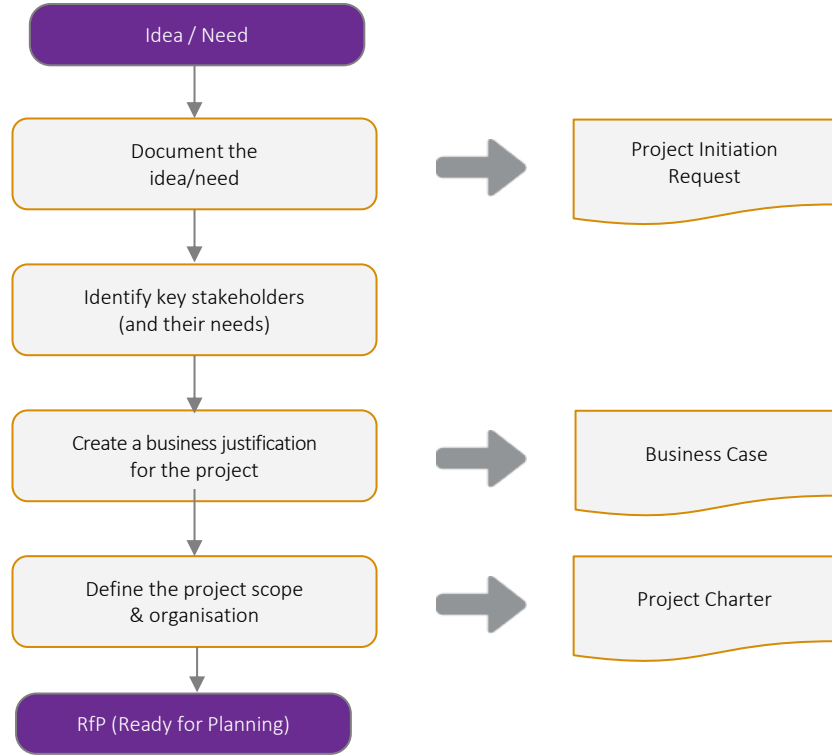
- Set the project objectives.
- Get the business justification.
- Make the preliminary planning.
- Start the project documentation.

Initiating Phase: The PM² Artefacts Landscape

Initiating Phase

MANAGEMENT PLANS
- Requirements Management Plan
- Project Change Management Plan
- Risk Management Plan
- Issue Management Plan
- Quality Management Plan
- Communications Management Plan

- Outsourcing Plan
- Deliverables Acceptance Plan
- Business Case
- Project Work Plan
- Project Handbook
- Transition Plan
- Project Initiation Request
- Project Charter
- Project Stakeholder Matrix
- Business Implementation Plan

MEETING DOCS
- Meetings Agendas
- Minutes Of Meetings
- Change Request Form

PROJECT REPORTS
- Project Progress Report
- Quality Review Report
- Project Status Report

- Project-End Report

Initiating — Planning — Executing — Closing

Monitor & Control

PROJECT LOGS
- Change Log
- Risk Log
- Issue Log
- Decision Log

Project Work Plan *(updates)*

CHECKLISTS
- Phase-exit Review Checklist
- Quality Review Checklist
- Stakeholders Checklist
- Deliverables Acceptance Checklist
- Transition Checklist
- Business Implementation Checklist

Methodologies Office   PM²

Project Initiation Request (TOC)

Purpose

Ensure that the problem/need/opportunity as well as project concept is captured in writing.

RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Initiation Request	I	N/A	A/S	R	S/C	I	N/A	N/A

Project Initiation Request

TABLE OF CONTENTS

Purpose

- Captures the reasoning for the project.

- Provides the justification for the project and establishes its budgetary constraints.

- Provides information to determine whether the project should move ahead or not.

A: PO

Project Initiation Request

R: BM

S: SP, PM
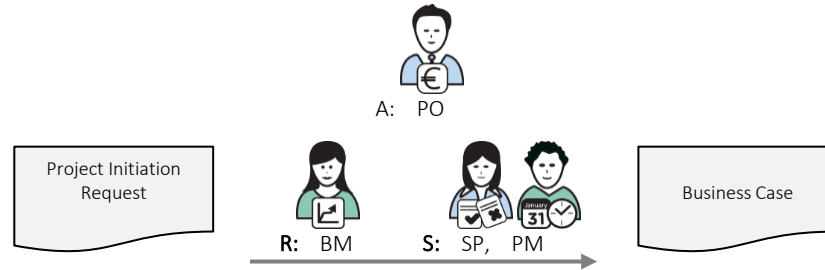
Business Case

RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Business Case	I	C	A	R	C	S	S	N/A

Initiating Phase: Business Case

TABLE OF CONTENTS

Purpose

- The key element of the project approval process (along with the Business Case).
- Provides a basis for the more detailed project planning.
- It includes the What, How and When fundamentals of the project.
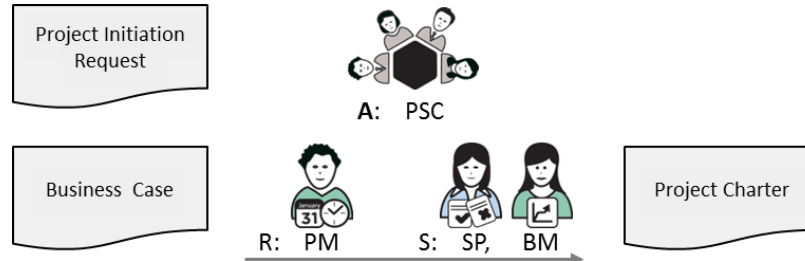
RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Charter	I	A	C	S	C	S	R	C

Initiating Phase: Project Charter

TABLE OF CONTENTS

Initiating Documents Strategy
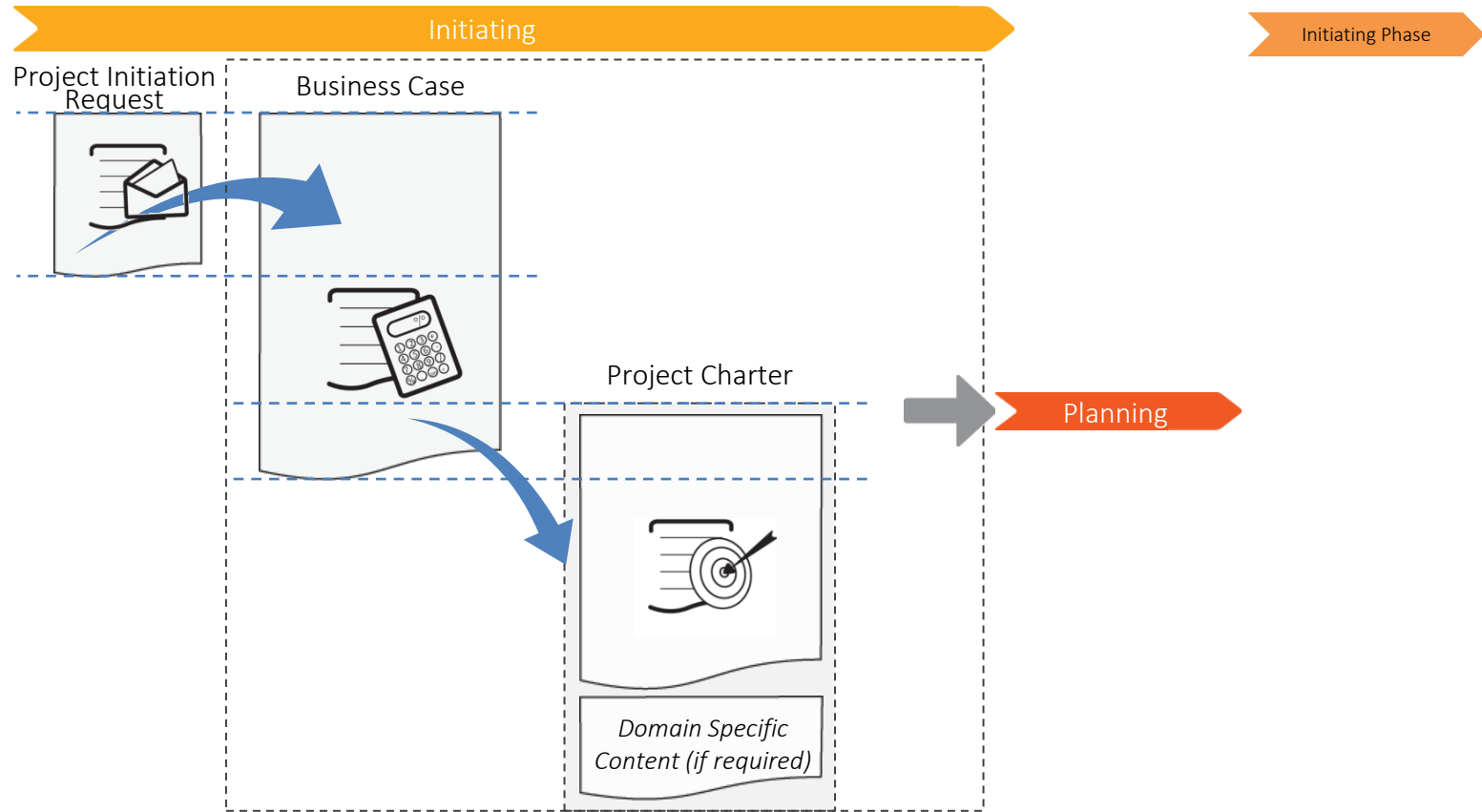
Phase Gate: RfP (Ready for Planning)?

Planning Phase

Planning Kick-off meeting → Project Handbook → Project Work Plan → Stakeholder Matrix → Plans

Artefacts	Initiating	Planning	Executing	Closing
		Planning Kick-off/ MoM Project Handbook - Roles & responsibilities - Management plans - Requirements management Project Stakeholder Matrix Project Work Plan Transition Plan Business Implementation Plan		

RfE — Ready for Executing

Monitor & Control

What happens in the Planning Phase?

RfP (Ready for Planning)

Kick-Off meeting → Kick-Off Agenda & MoM

Tailor the PM² process → Project Handbook & Management Plans

Assign roles & responsibilities → Project Stakeholder Matrix

Elaborate project scope → Project Handbook

Develop work breakdown and project schedule → Project Work Plan

Develop the project plans → All Project Plans

Distribute plans to stakeholders

RfE (Ready for Executing)

- Develop the project scope statement.
- Determine the project approach and main activities.
- Develop the schedule for the various tasks and estimate the necessary resources.
- Assign roles and responsibilities.
- Develop the Project Handbook and various project plans for the project.

Planning Phase: The PM² Artefacts Landscape

Planning Phase

MANAGEMENT PLANS
- Requirements Management Plan
- Project Change Management Plan
- Risk Management Plan
- Issue Management Plan
- Quality Management Plan
- Communications Management Plan

- Outsourcing Plan
- Deliverables Acceptance Plan
- Business Case
- Project Work Plan
- Project Handbook
- Transition Plan
- Project Initiation Request
- Project Charter
- Project Stakeholder Matrix
- Business Implementation Plan

MEETING DOCS
- Meetings Agendas
- Minutes Of Meetings
- Change Request Form

PROJECT REPORTS
- Project Progress Report
- Quality Review Report
- Project Status Report
- Project-End Report

Initiating | Planning | Executing | Closing

Monitor & Control

PROJECT LOGS
- Change Log
- Risk Log
- Issue Log
- Decision Log

Project Work Plan *(updates)*

CHECKLISTS
- Phase-exit Review Checklist
- Quality Review Checklist
- Stakeholders Checklist
- Deliverables Acceptance Checklist
- Transition Checklist
- Business Implementation Checklist

Methodologies Office   PM²

Purpose

- Summarizes the project objectives.
- Documents the overall project management approach and tailoring.
- Defines the key controlling processes, the project policies and rules.
- It becomes the basis for managing the project throughout its lifecycle as an important point of reference.

RASCI

Business Case

A: PO

Planning Kick-Off Meeting Minutes

Project Charter

R: PM   S: BM
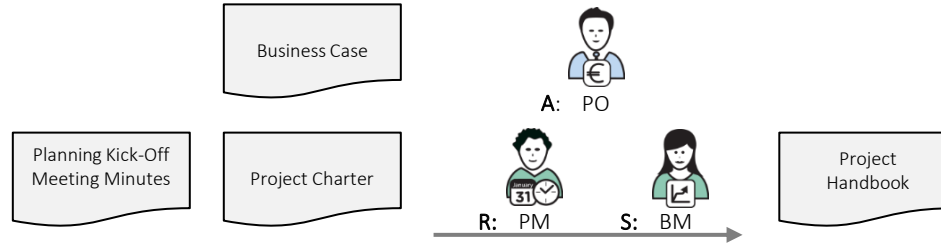
Project Handbook

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Handbook	I	I	A	S	C	I	R	C

Project Handbook (2)

TABLE OF CONTENTS

Purpose

- Lists all (key) project stakeholders and their contact details and clearly states their role(s) in the project.

- It may also include a classification or categorisation of each stakeholder
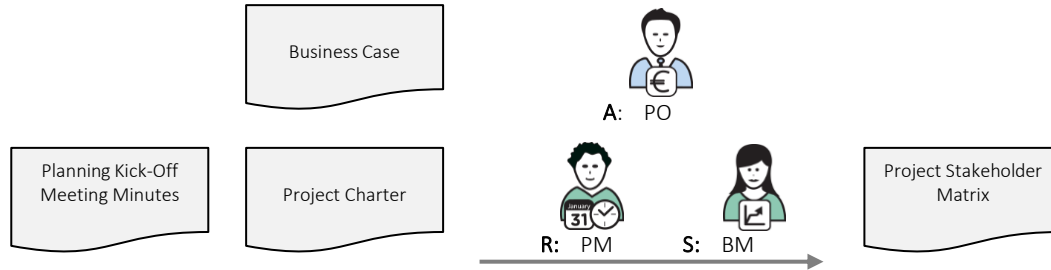
RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Stakeholder Matrix	I	I	A	S	C	I	R	C

Project Stakeholder Matrix (2)

1. PM^2-P02: Project Stakeholder Matrix	Planning Phase

TABLE OF CONTENTS

Project Work Plan (1)

Purpose

- Identifies and organises the project into activities, sub-tasks, and work packages.

- Establishes a base to estimate the duration of the project.

- Determines the required resources and schedules the work.

- It is used as the basis to monitor the progress and control the project.

RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Work Plan	I	A	C	S/C	C	C	R	S/C

Project Work Plan (2)

TABLE OF CONTENTS

Planning: The PM² Management Plans

- Risk Management Plan
- Issue Management Plan
- Requirements Management Plan
- Project Change Management Plan
- Quality Management Plan
- Communications Management Plan

Part of the Project Handbook

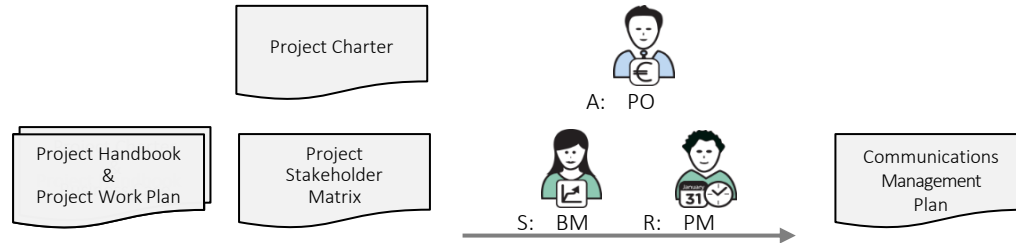Or standalone

Communications Management Plan

Purpose

- Ensures that the Project Core Team and all the Project Stakeholders will have the information they need to perform their roles throughout the project.

- Defines and documents communication activities, their goals, content, format, frequency and audience with both the performing and the participating organisation.

Project Charter

A: PO

Project Handbook & Project Work Plan

Project Stakeholder Matrix

S: BM   R: PM

Communications Management Plan

RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Communication Management Plan	I	I	A	S	C	I	R	C

Transition Plan

Purpose

Ensures a controlled and smooth transition from the old state to the new state in which the new product/service developed by the project is put in place.
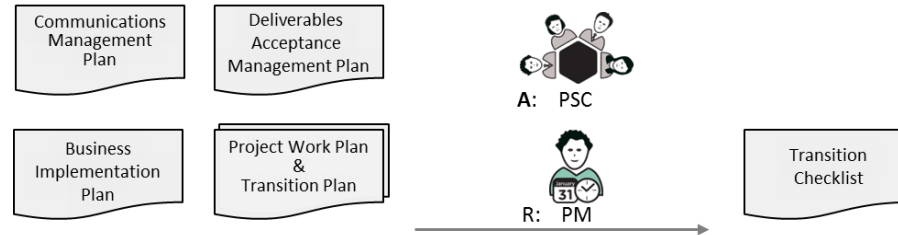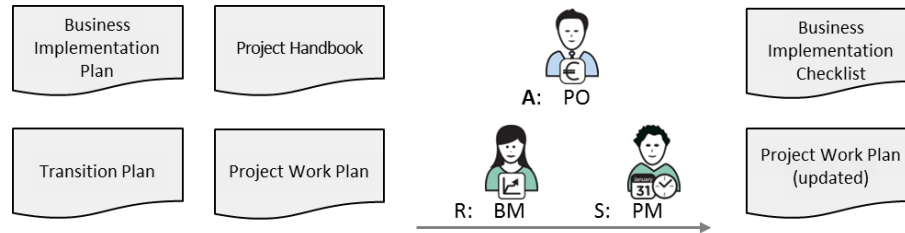

RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Transition Plan	I	A	C	C	C	C	R	C

Business Implementation Plan

Purpose

- All business implementation activities are critical for smooth operations.
- Business implementation activities are complementary to transition activities.
- Outlines the impact of the project on the organisation.
- Defines the change management activities that permanent organisation need to carry out, usually as part of ongoing operations or future projects (post-actual project activities).
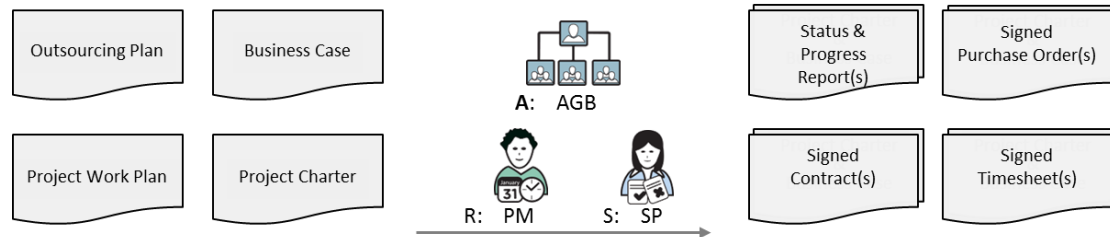

RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Work Plan	I	I	A	R	C	I	S	I

Outsourcing Plan

Purpose

- Outlines the scope of products and/or services to be contracted outside the organisation.

- Defines the time, cost and quality expectations from the Contractor' organisation.

- Identifies responsibilities for the full contract lifecycle (the Project Manager, procurement group, the Contractor's organisation, etc.)
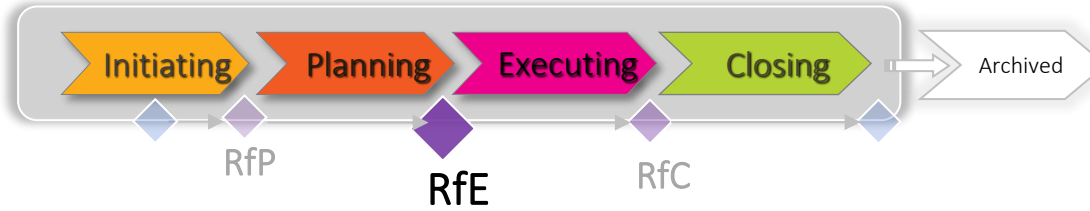

RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Outsourcing Plan	A	C	C	C	I	S	R	I

RfE (Ready for Executing)?

Executing Phase

Executing Kick-off meeting

Coordinating Project Work

Project Deliverables

Distributing Information

Coordinating People and Resources

Quality Assurance

Artefacts

Initiating	Planning	Executing	Closing
		Executing Kick-Off/MoM	
		Meeting Agendas/MoMs	
		Project reports	
		Change Requests	
		Deliverables Acceptance Note	

RfC

Ready for Closing

Monitor & Control

What happens in the Executing Phase

RfE (Ready for Executing)

Kick-Off meeting → Kick-off Agenda & MoM

Coordinate project:

Conduct meetings → Meetings Agendas/MoMs

Assure quality → Audit reports

Create project reports → Project reports

Distribute information

Ensure deliverables acceptance → Deliverables Acceptance Note

RfC (Ready for Closing)

- Coordinate the project work, people and resources.

- Execute various project plans.

- Report on the project progress and status.

- Produce the project deliverables.

- Prepare for their reception (the requestor organisation).

Executing Phase: The PM² Artefacts Landscape

Executing Phase

MANAGEMENT PLANS
- Requirements Management Plan
- Project Change Management Plan
- Risk Management Plan
- Issue Management Plan
- Quality Management Plan
- Communications Management Plan

- Outsourcing Plan
- Deliverables Acceptance Plan
- Business Case
- Project Work Plan
- Project Handbook
- Transition Plan
- Project Initiation Request
- Project Charter
- Project Stakeholder Matrix
- Business Implementation Plan

MEETING DOCS
- Meetings Agendas
- Minutes Of Meetings
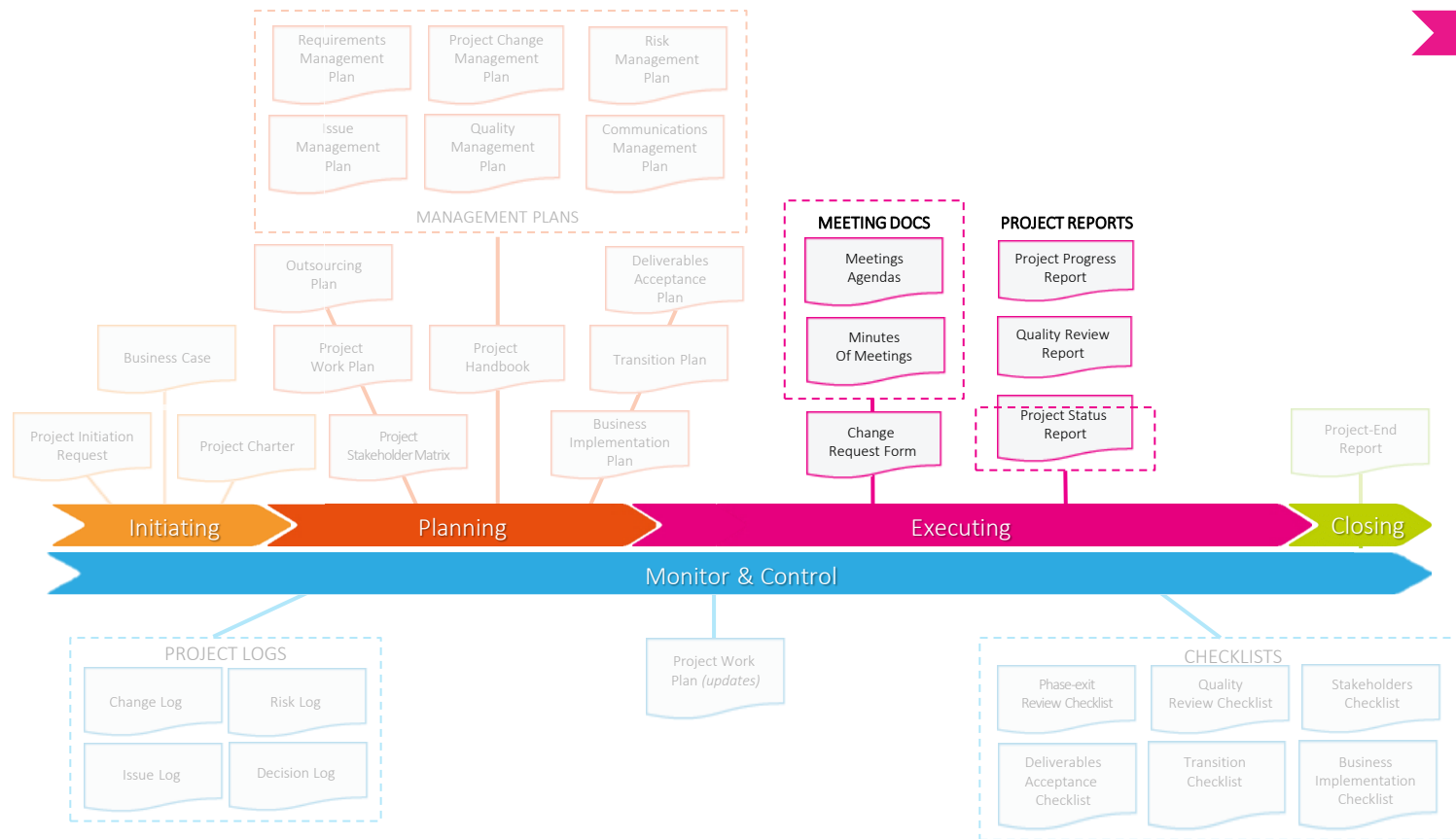- Change Request Form

PROJECT REPORTS
- Project Progress Report
- Quality Review Report
- Project Status Report

- Project-End Report

Initiating | **Planning** | **Executing** | **Closing**

Monitor & Control

PROJECT LOGS
- Change Log
- Risk Log
- Issue Log
- Decision Log

Project Work Plan *(updates)*

CHECKLISTS
- Phase-exit Review Checklist
- Quality Review Checklist
- Stakeholders Checklist
- Deliverables Acceptance Checklist
- Transition Checklist
- Business Implementation Checklist

Methodologies Office

PM²

Project Coordination

Purpose

- Facilitates the project's progress by continuously providing information to the Project Core Team (PCT) and supporting the completion of assigned work;

- Includes allocating project resources to activities, performing regular quality checks of interim results, maintaining ongoing communication with all project team members, and keeping everyone involved in the project motivated through leadership, negotiations, conflict resolution
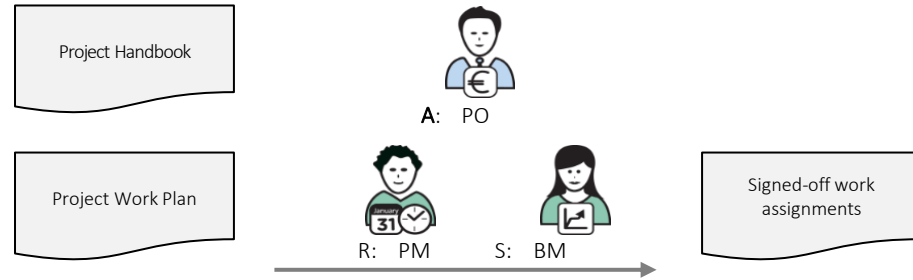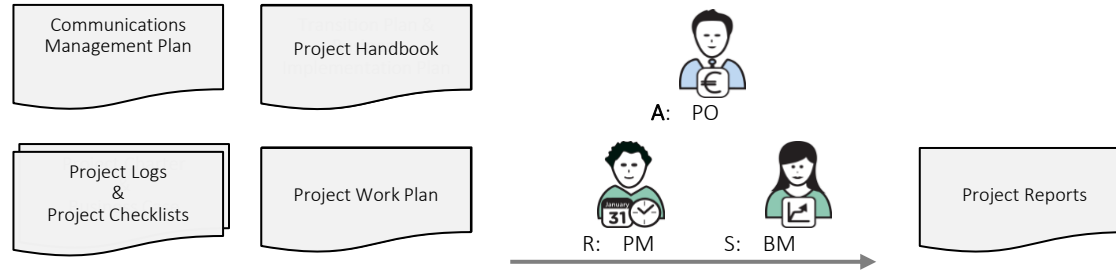

RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Coordination	I	I	A	S	I	I	R	I

Project Reporting

Purpose

- Communicates consolidated information concerning project performance to the appropriate stakeholders, enabling decision-making.

- Typically provides information on scope, schedule, effort/cost and quality, the status of risks, issues, project changes and outsourcing.

- May also contain agreed project indicators and metrics for evaluating progress.

Communications Management Plan

Project Handbook

Project Logs & Project Checklists

Project Work Plan

A: PO

R: PM   S: BM

Project Reports

RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Reporting	I	I	A	S/C	I/C	I/C	R	C

PM² Project Reports

Project Progress Report

Project Status Report

Purpose

Keeps project stakeholders informed about relevant project details through the regular distribution of project reports, as per the Communications Management Plan and project stakeholder needs
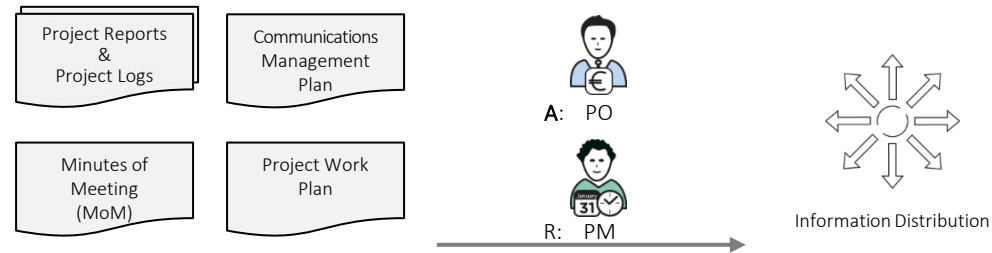
RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Reporting	I	I	A	C	I	I	R	C

Quality Assurance

Purpose

- Gathers evidence that proves the project work is following high-quality standards, methodologies and best practices.

- Describes in the Quality Management Plan and executes the relevant activities.

- Includes determining whether appropriate project controls are in place, confirming that they are being implemented and assessing their effectiveness.

RASCI
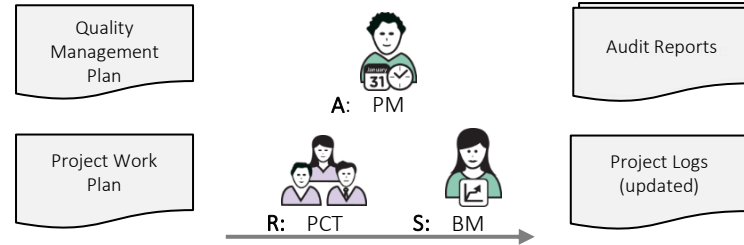
RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Quality Assurance	I	I	I	S	C	I	A	R

Monitor & Control

Initiating	Planning	Executing	Closing

Monitor & Control

Activities
- Monitor Project Performance
- Control Schedule
- Control Cost
- Manage Quality
- Manage Project Change
- Manage Risks
- Manage Requirements

- Manage Issues and Decisions
- Manage Stakeholders
- Manage Deliverables Acceptance
- Manage Transition
- Manage Business Implementation
- Manage Outsourcing

Artefacts

Regularly updated
- ☐ Risk Log
- ☐ Issue Log
- ☐ Decision Log
- ☐ Change Log
- ☐ Project Work Plan

Checklists
- ☐ Phase-exit Review Checklist
- ☐ Quality Review Checklist
- ☐ Deliverables Acceptance Checklist
- ☐ Transition Checklist
- ☐ Business Implementation Checklist
- ☐ Stakeholder Checklist

Methodologies Office

PM²

What happens during Monitor & Control

All work is observed from the point of view of the Project Manager. The key activities:

Manage:

- Execute all management processes defined in the Project Management Plans, and manage the outsourcing, transition, business implementation and deliverables acceptance activities as per the relevant Project Specific Plans.

Monitor:

- Monitor project activities and overall project performance.
- Track the project performance against the baseline to facilitate reporting and controlling.

Control:

- Devise, plan, propose and implement corrective actions to address existing or potential performance risks or issues, while updating the relevant project plans and logs.

Monitor & Control Activities

- Monitor Project Performance
- Control Schedule
- Control Cost
- Manage Stakeholders
- Manage Requirements
- Manage Project Change
- Manage Risks
- Manage Issues and Decisions
- Manage Quality
- Manage Deliverables Acceptance
- Manage Transition
- Manage Business Implementation
- Manage Outsourcing

Monitor Project Performance

Purpose

- Collects information about the state of the project's progress and overall health.

- Tracks the project dimensions of scope, schedule, cost and quality, monitors risks, issues and project change, and forecasts their evolution for the purpose of reporting the overall project progress to relevant stakeholders as per the Communications Management Plan.
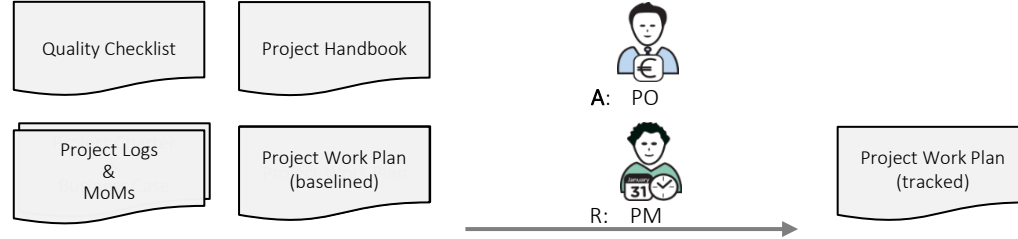
RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Monitor Project Performance	I	I	A	C	C	I	R	C

Control Schedule

Purpose

- Ensures that project tasks are carried out as scheduled and that project deadlines are met.

- Regularly monitors the schedule and tracks the difference between planned, actual and forecast activities/deadlines.

- Informs the Project Steering Committee (PSC) about any risks for the schedule for the informed decision-making.

Change Log	Project Handbook		Project Work Plan (updated)
MoMs & Project Reports	Project Work Plan		Project Logs (updated)

A: PO

R: PM
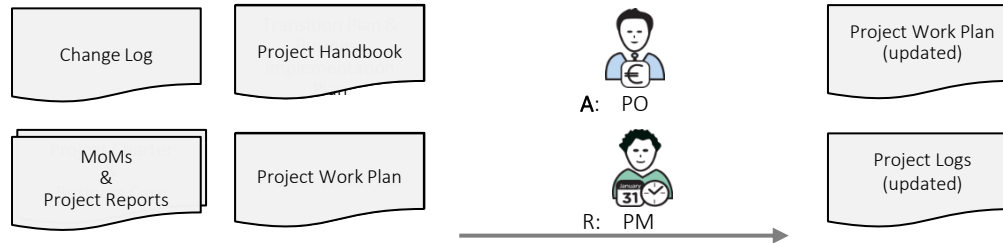
RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Control Schedule	I	I	A	C	C	I	R	C

Cost Control

Purpose

- Manages the project costs so that they conform to the cost/effort baseline and overall project budget constraints.

- Regularly monitors the budget and tracks the difference between budgeted, actual and expected costs.

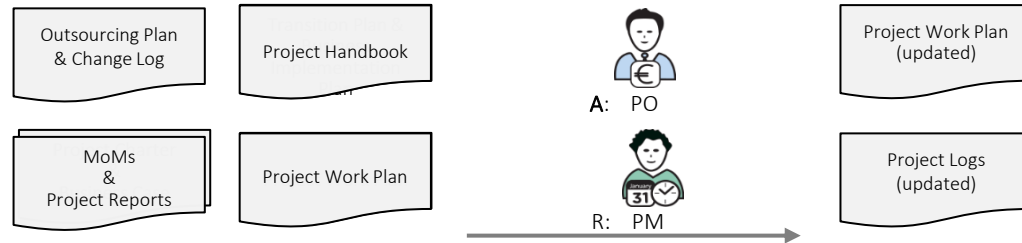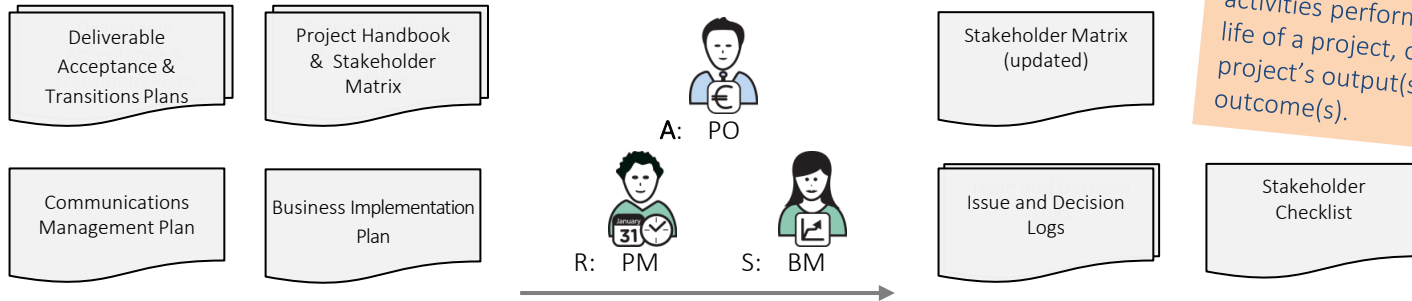- Informs the Project Steering Committee (PSC) about any risks for the schedule for the informed decision-making.

RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Control Cost	I	I	A	C	C	I	R	C

Manage Stakeholders

Purpose

- Identifies project stakeholders, captures their project expectations and requirements.

- Defines communication strategy and performs activities to communicate with stakeholders throughout project lifecycle and encourages them to get involved and contribute.

- Monitors and captures stakeholders' overall project experience and satisfaction.

Project stakeholders are people (or groups) who can affect or can be affected by both the activities performed during the life of a project, or/and by the project's output(s) and outcome(s).

Deliverable Acceptance & Transitions Plans

Project Handbook & Stakeholder Matrix

A: PO

Stakeholder Matrix (updated)

Communications Management Plan

Business Implementation Plan

R: PM   S: BM

Issue and Decision Logs

Stakeholder Checklist

RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Stakeholders	I	I	A	S/C	I	C	R	I

Slide 89

Purpose

- Gathers, documents and validates requirements, and manages their implementation and change.

- Runs throughout the project lifecycle and relates to other project management processes, such as quality and change management.
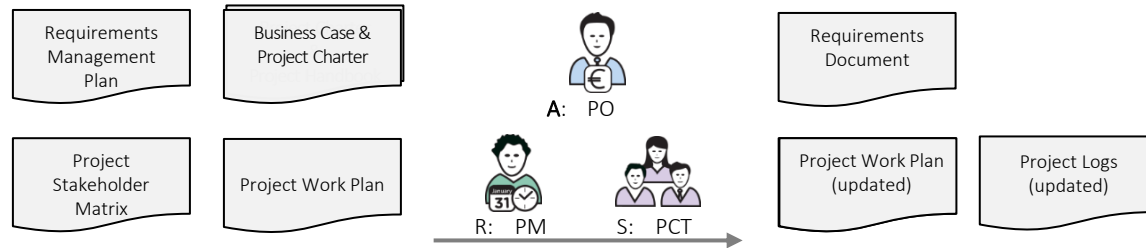
RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Requirements	I	I	A	C	C	I	R	S

Monitor & Control: Manage Requirements

Manage Project Change (1)

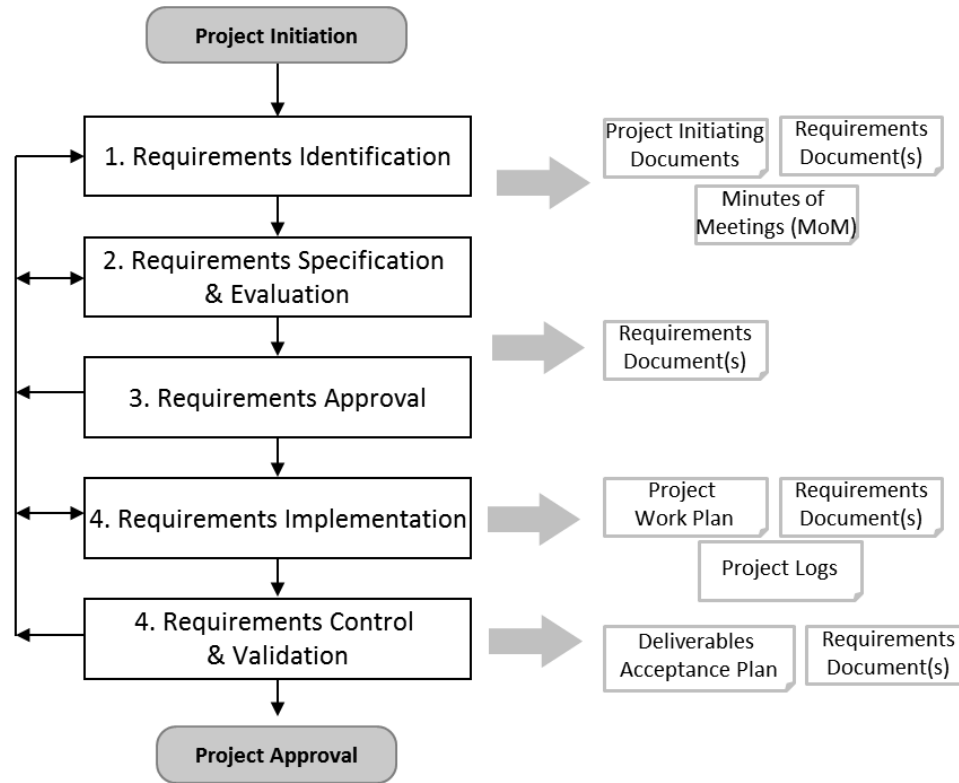## Purpose

Identifies, documents, assesses, prioritises, approves, plans and controls project changes, and communicats them to all relevant stakeholders.

Changes can be requested (or identified and raised) throughout the project lifecycle by any project stakeholder and can be related to a change in the project scope, requirements, deliverables and features, or quality characteristics of the project.

RASCI
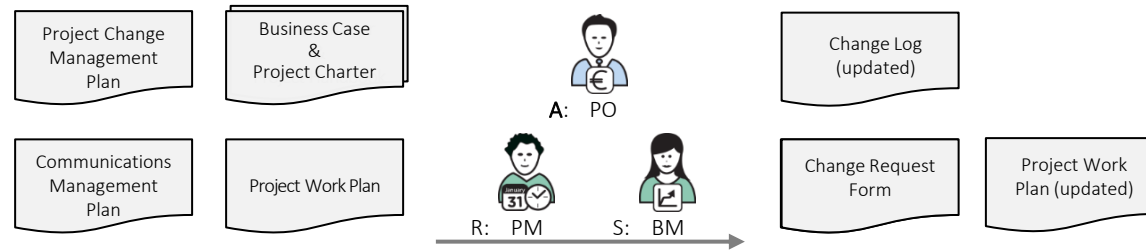
RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Project Changes	I	C	A	S	I	I	R	C

Manage Project Change (2)

Manage Risk (1)

Purpose

- Identifies, assesses and manages risks so that they conform to the organisation's accepted risk attitude.
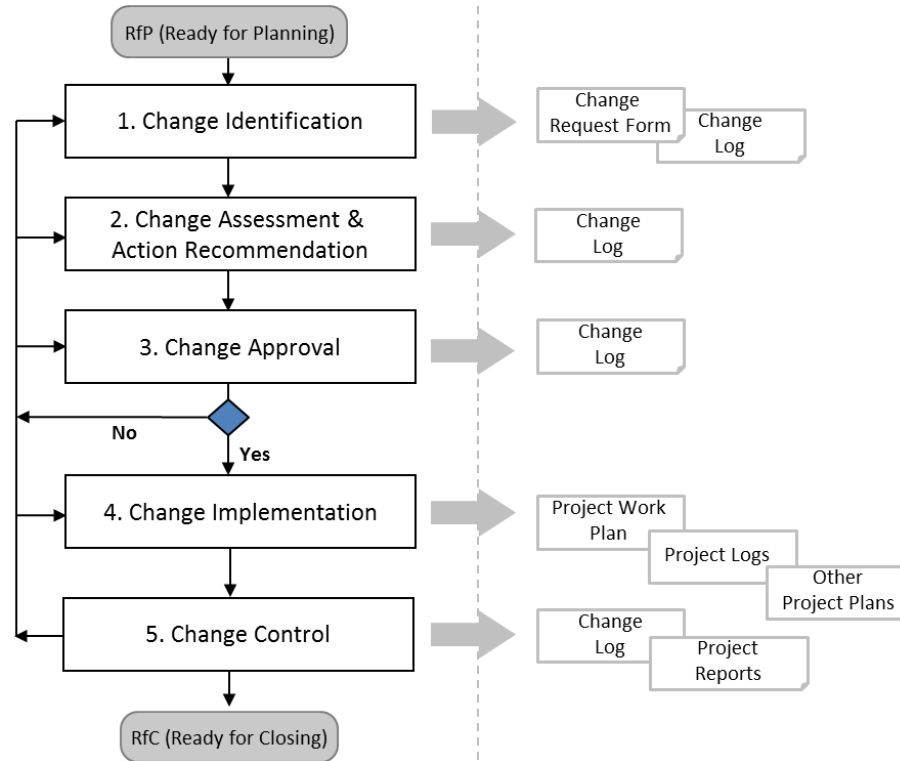
- Improves the project team's confidence by proactively managing any potential event that might have a positive or negative impact on project objectives.

A **risk** is an uncertain event or set of events (positive or negative) that, should it occur, will have an impact on the achievement of project objectives.

RASCI
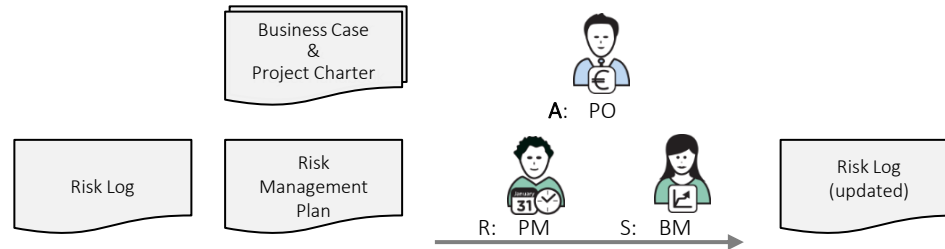
RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Risk	I	C	A	S/C	C	I	R	C

Manage Risk (2)

Manage Issues & Decisions (1)
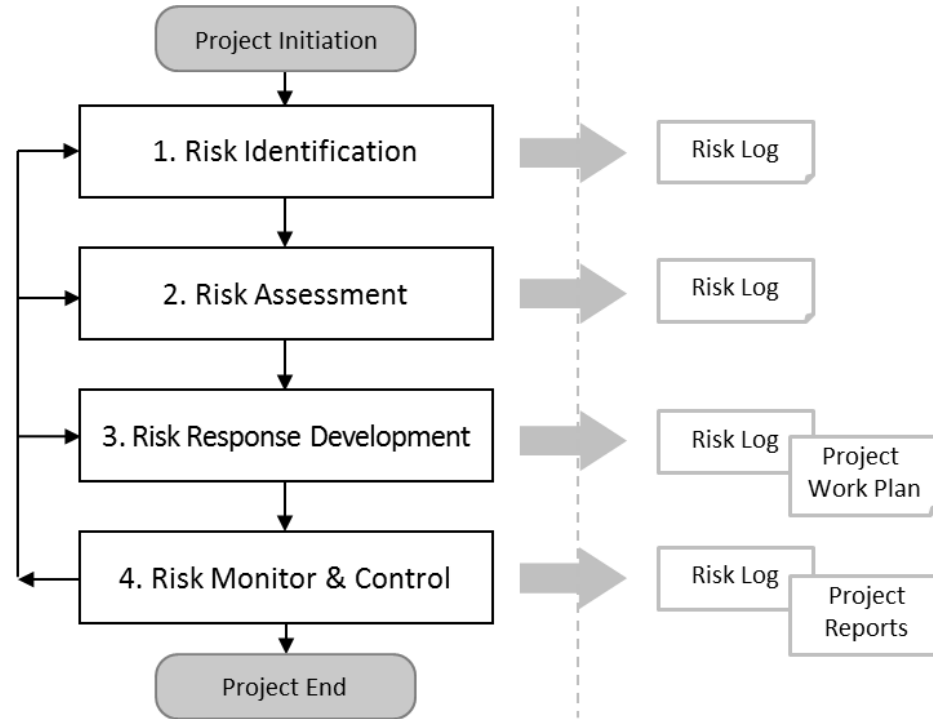
Purpose

- Identifies, evaluates and manages issues for resolution by project stakeholders, and decisions are taken, documented and implemented.

- Issues and decisions are often linked to the resolution of other log items (e.g. risks, changes).

An **issue** is an immediate problem requiring resolution. Anyone can raise issues. It is always important to solve the root cause, not the symptom. This will ensure that the problem will not re-occur.
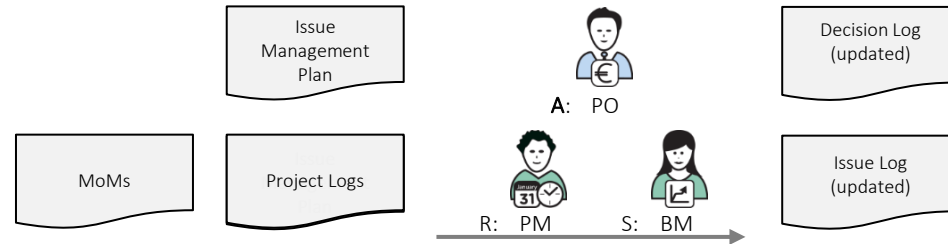
RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Issues & Decisions	I	I	A	S	C	I	R	C

Manage Issues & Decisions (2)

Manage Quality

RfP (Ready for Planning)

1. Quality Characteristics Definition
- Quality Management Plan
- Quality Review Checklist
- Deliverables Acceptance Plan
- Deliverables Acceptance Checklist

2. Quality Assurance
- Audit Reports
- Updated Project Documents

3. Quality Control
- Quality Review Reports
- Deliverables Acceptance Checklist (updated)
- Quality Review Checklist (updated)
- Project Documents (updated)

4. Deliverables Acceptance
- Deliverables Acceptance Checklist (updated)
- Deliverables Acceptance Sign-off

5. Final Acceptance
- Project End-Report
- Project Repository (updated)
- Project Sign-off

Project End

Continuous Improvement

Manage Deliverable Acceptance

Purpose

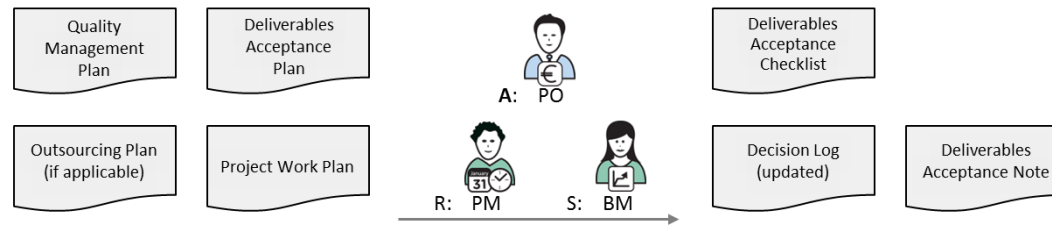Ensures project deliverables are based on predefined objectives and set of criteria as defined in the Deliverables Acceptance Plan.

The final project acceptance takes place in the Closing Phase.

RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Deliverable Acceptance	I	I	A	S	C	C	R	C

Purpose

- Ensures a controlled and smooth transition from the old state to the new state in which the new product/service developed by the project is put in place.

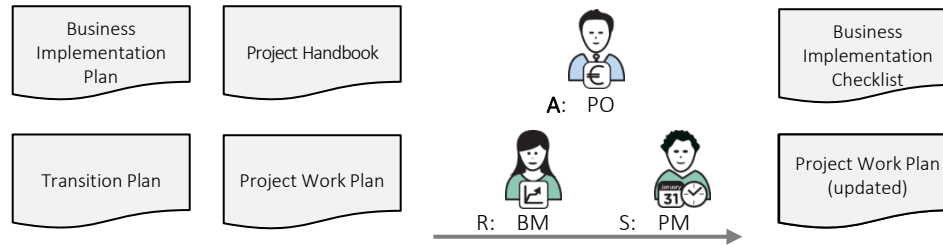- Ensures the correct transfer of project deliverables to the project requestor organisation.
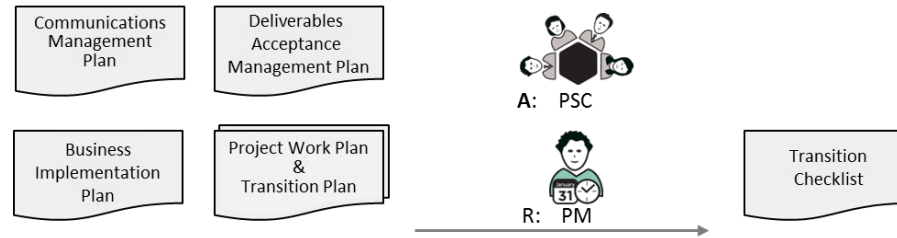
RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Transition	I	A	C	C	C	C	R	C

Manage Business Implementation

Purpose

- Executes all business implementation activities, critical for smooth operations, even after the project's outputs have been delivered to the stakeholder/user community.

- A good practice to also define some post-project change activities, however, their implementation falls outside the domain of responsibilities of the project.

| Business Implementation Plan | Project Handbook | | Business Implementation Checklist |

A: PO

RASCI

| Transition Plan | Project Work Plan | R: BM   S: PM | Project Work Plan (updated) |

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Business Implementation	I	I	A	R	C	I	S	I

Manage Outsourcing

Purpose

- Ensures that the Contractor delivers acceptable quality of work as defined in the Outsourcing Plan.

- This work is undertaken by the Project Manager (PM) in conjunction with the relevant procurement groups and the Contractor's Project Manager (CPM).
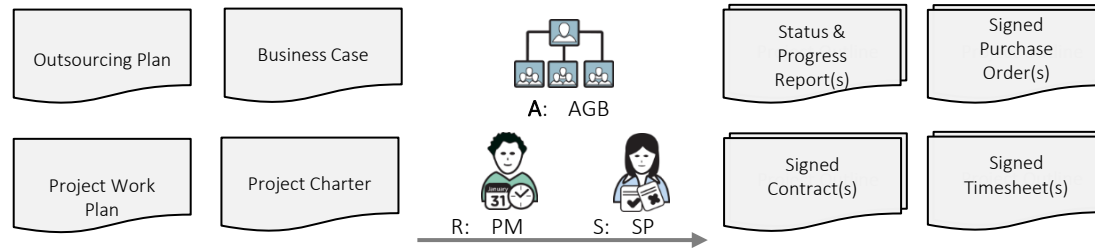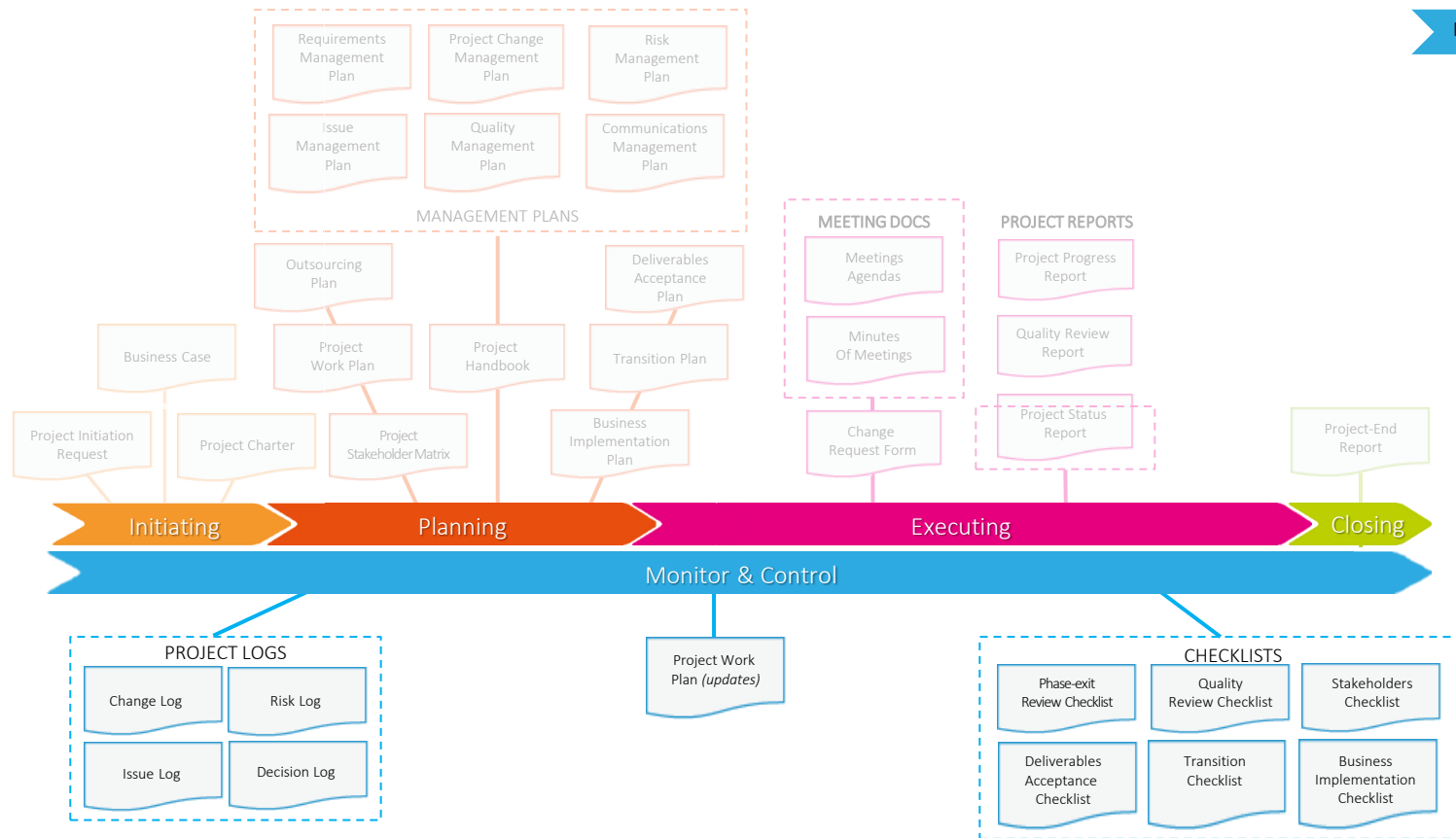

RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Outsourcing	A	C	C	C	I	S	R	I

Monitor & Control Artefacts

Logs

Issue Log
< Project Name >

PM² Logs V.3,0

	Issue Identification and Description						Issue Assessment and Action Description							
ID	Category	Issue Name	Issue Description & Details	Status	Identified By	Identification Date	Action Details (effort & responsible)	Urgency	Impact	Size	Target Date	Issue Owner	Escalation	Traceability/Comments
IL1	*<External>*	*<Non-compliance with the quality*	*<Detail text 1>*	*<Open>*	*<Name X>*	*xx/xx/xx*	*<For the remediation plan, the following actions should be>*	*<4>*	*<5>*	*<4>*	*xx/xx/xx*	*<Name Z>*	*<Yes>*	*<Related artefacts: Work Plan ID: WP10*

Decision Log
< Project Name >

PM² Logs v3,0

	Identification						Ownership			Implementation	
ID	Category	Title	Description	Initiated by	Persons present during decision	Comments	Decision Owner	Decision Date	Escalation	Application Date	Decision communicated to:
D01	*<Business>*	*<Change in*	*<Detail text 1>*	*<Name X>*	*<Project Steering*	*<Related artefacts:*	*<Project*	*<dd/mm/yyyy>*	*<Yes>*	*<dd/mm/yyyy>*	*<Project Core Team, Project*

Change Log
<Project Name>

PM² Logs v3.0

	Identification						Assessment				Decision				Implementation	
ID	Category	Title	Description	Status	Requested by	Date Identified	Action Details (effort & responsible)	Size	Priority	Target Delivery Date	Escalation	Decision	Decided by	Decision Date	Actual Delivery Date	Comments
CO1	*<New Requirement*	*<New service*	*<Detail text 1>*	*<Identified>*	*<Name X>*	*<dd/mm/yyyy>*	*<For the new service*	*<XS,*	*<High, Medi*	*<dd/mm/yyyy>*	*<Yes>*	*<Approved>*	*<Name Z>*	*<dd/mm/yyyy*	*<dd/mm/yyyy*	*<Related artefacts:*

Risk Log
<Project Name>

PM² Logs V.3.0

	Risk Identification and Description						Risk Assessment					Risk Response			
ID	Category	Risk Name	Risk Description & Details	Status	Identified By	Identification Date	Likelihood	Impact	Risk Level (L*I)	Risk Owner	Escalation	Risk Response Strategy	Action Details (effort & responsible)	Target Date	Traceability/Comments
RLO1	*<Business>*	*<Internal Fraud>*	*<Because of (CONDITION), it might be that (EVENT), which will lead to(IMPACT).>*	*<Proposed>*	*<Name X>*	*<xx/xx/xx>*				*<Name M>*	*<Yes>*				
RLO2	*<IT>*	*<Unauthorized access to data>*	*<As a result of (CAUSE), (EVENT) may occur, which would lead to (EFFECT)>*	*<Investigating>*	*<Name Y>*	*<xx/xx/xx>*				*<Name H>*	*<Yes>*				
RLO3	*<External>*	*<Poor contractor performance>*	*<Because of (CONDITION), it might be that (EVENT), which will lead to(IMPACT).>*	*<Approved>*	*<Name Z>*	*<16/04/13>*	*<3>*	*<4>*	*<12>*	*<Name K>*	*<Yes>*	*<Reduce>*	*<The contract with the Outsourcer will include detailed SLAs and associated financial penalties.>*	*<05/06/2013>*	*<Related artefacts: - Decision Log ID: DL03.>*
RLO4	*<IT>*	*<Unavailability of data, systems or services>*	*<As a result of (CAUSE), (EVENT) may occur, which would lead to (EFFECT)>*	*<Approved>*	*<Name A>*	*<16/04/13>*	*<2>*	*<4>*	*<8>*	*<Name L>*	*<Yes>*	*<Reduce>*	*<Define and agree on with the hosting environment Responsible the necessary activities, document them in a plan and monitor the*	*<05/09/2013>*	*<Related artefacts: - Decision Log ID: DL04 - Work Plan ID: WP05>*

Summary – Monitor & Control

- Monitor project performance

- Control Project variables (compared to plans)

- Use Project Logs to control the project

- Execute Project Management Plans and related activities

- Take corrective actions -> update plans

RfC (Ready for Closing)?

Closing Phase

Project-End Review: meeting

Lessons Learned

&

Best Practices

Administrative Closure

Artefacts	Initiating	Planning	Executing	Closing

				☐ Project-End Review Agenda/ MoM
				☐ Project-End Report
				   - Lessons Learned
				   - Best Practices
				   - Post Project Recommendations
				☐ Project Acceptance Note

Monitor & Control

What happens in the Closing Phase

```
RfC (Ready for Closing)
        ↓
Project-End Review          →    Project-End Review
Meeting                          Agenda/MoM
        ↓
Capture lessons Learned     →    Project-End
& Post-Project                   Report
Recommendations
        ↓
Final project acceptance    →    Project Acceptance
                                 Note (if required)
        ↓
Release resources
        ↓
Archive project             →    [Projects Archive]
        ↓
End of Project
```

Projects Archive
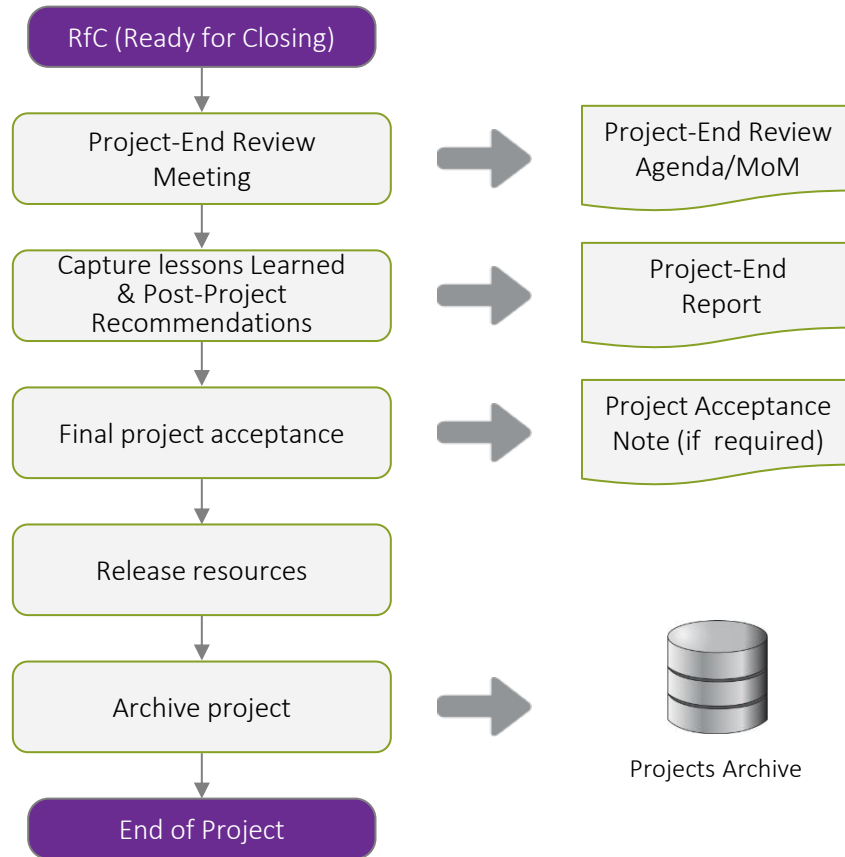
- Finalise all project activities.
- Document project's final state.
- Discuss and capture Lessons Learned and Best Practices, and post-project recommendations.
- Accept project deliverables.
- Formally close the project.

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Closing Phase: The PM² Artefacts Landscape

Closing

MANAGEMENT PLANS
- Requirements Management Plan
- Project Change Management Plan
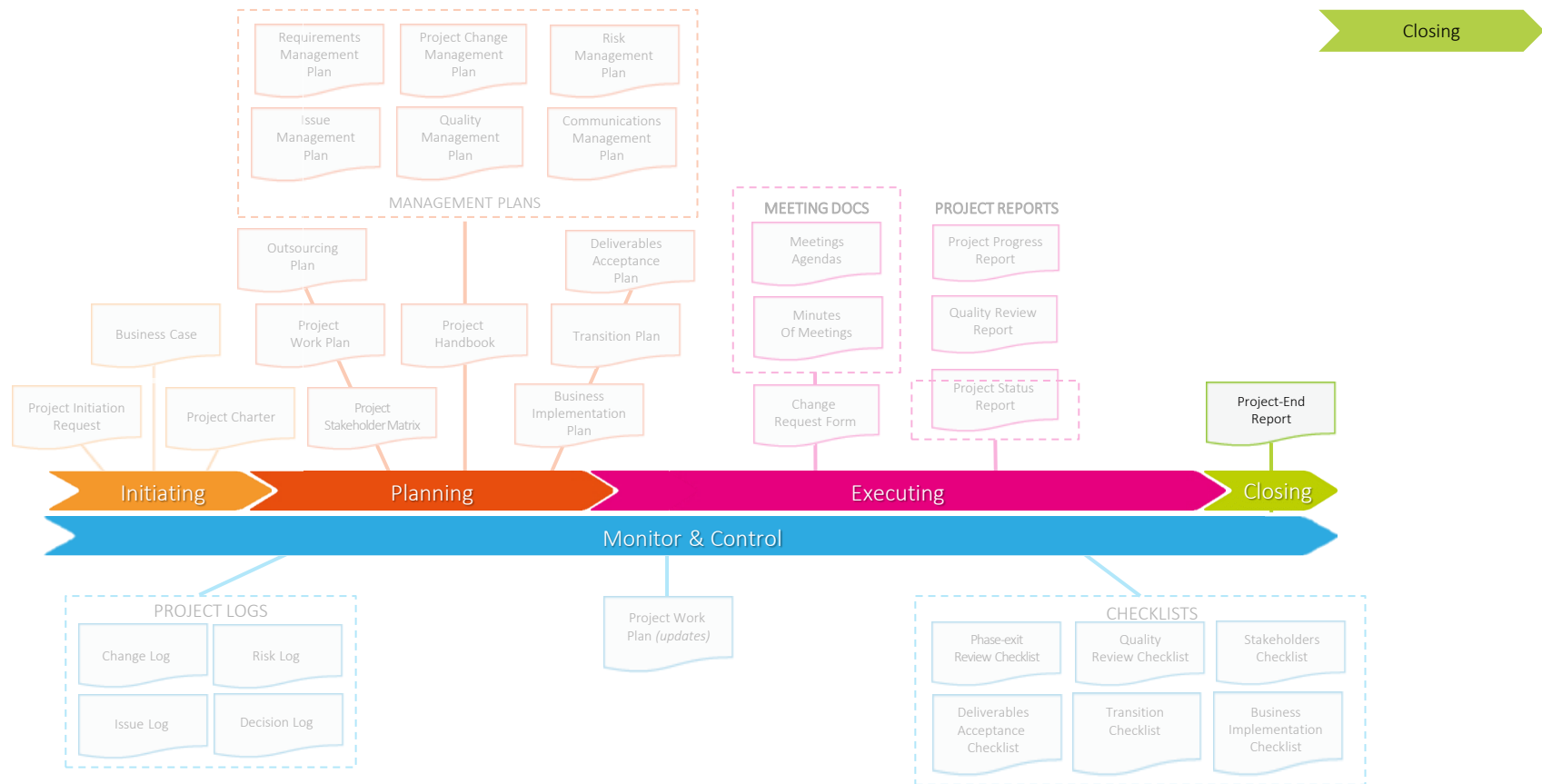- Risk Management Plan
- Issue Management Plan
- Quality Management Plan
- Communications Management Plan

- Outsourcing Plan
- Deliverables Acceptance Plan
- Business Case
- Project Work Plan
- Project Handbook
- Transition Plan
- Project Initiation Request
- Project Charter
- Project Stakeholder Matrix
- Business Implementation Plan

MEETING DOCS
- Meetings Agendas
- Minutes Of Meetings
- Change Request Form

PROJECT REPORTS
- Project Progress Report
- Quality Review Report
- Project Status Report

Project-End Report

Initiating	Planning	Executing	Closing

Monitor & Control

PROJECT LOGS
- Change Log
- Risk Log
- Issue Log
- Decision Log

Project Work Plan *(updates)*

CHECKLISTS
- Phase-exit Review Checklist
- Quality Review Checklist
- Stakeholders Checklist
- Deliverables Acceptance Checklist
- Transition Checklist
- Business Implementation Checklist

Wrap-up

Course End: Lessons Learned (& Shared)

- What are your top 3 learnings?

- Which aspects of this course were delivered effectively?

- How can this course be improved?

You are using PM² for your project? We would like to hear about it!
Contact Us