## PM<sup>2</sup> Essentials Training Material

Based on PM<sup>2</sup> v3.0





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## Introduction







The European Commission's Project Management Methodology

#### **Objectives**



This course introduces the PM<sup>2</sup> Methodology of the European Commission.

#### It enables participants to:

- obtain the foundation knowledge necessary for using effectively the PM<sup>2</sup>
   Project Management Methodology.
- understand the full PM<sup>2</sup> project life cycle, organization, roles & responsibilities.
- understand the PM<sup>2</sup> Mindsets.
- Familiarise themselves with the key PM<sup>2</sup> Artefacts for initiating, planning, executing, controlling and closing projects.



#### Suggested Course Schedule



#### Session 1

- 09:00 Kick-off
- 09:30 Project (Management) Basics
- 10:15 Introduction to PM<sup>2</sup>
- 11:00 Break
- 11:15 Governance of Projects
- 11:45 Initiating Phase
- 12:30 Lunch

#### Session 2

- 13:30 Planning phase
- 14:30 PM<sup>2</sup> Mindset
- 15:00 Monitor & Control
- 15:15 **Break**
- 15:30 Monitor & Control (cont'd)
- 16:15 Closing Phase
- 17:00 Wrap-up



#### **Course Content**



Introduction Project (Management) basics PM<sup>2</sup> Overview **Project Governance** PM<sup>2</sup> Mindset **Phases and Artefacts** 



## Contact the CoEPM<sup>2</sup> Team







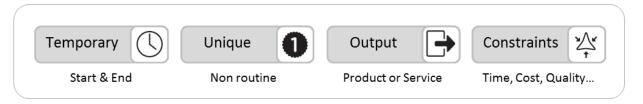
## Project (management) Basics



#### What is a Project?



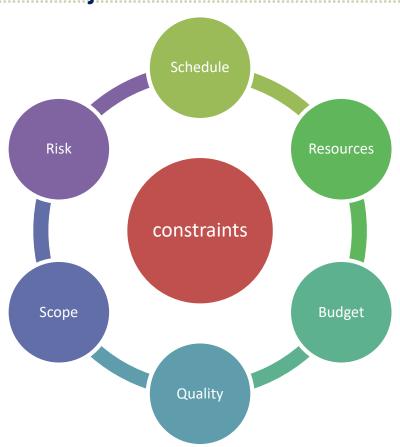
 A project is a temporary organisational structure which is set up to create a unique product or service (output) within certain constraints (such as time, cost, and quality).





## 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 certain outcomes. The measurable contribution towards strategic objective are considered the benefits of the project.

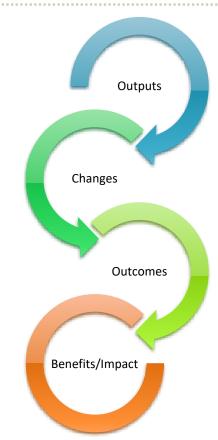


Note that project outcomes and benefits are often realized only after the project has closed

#### Why do we do Projects?



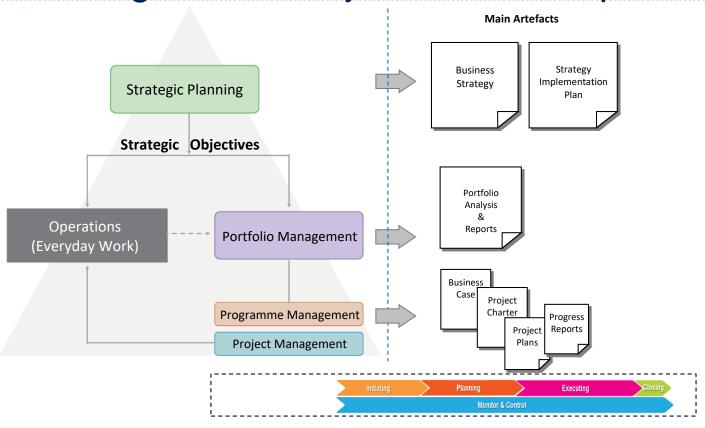
- Projects deliver Outputs (deliverables) that deliver a change (social, commercial, operational...)
- These changes generate outcomes for the beneficiaries or users.
- On the long term these outcomes produce benefits or impact.
- These benefits realize or support the organisation strategy.





### Portfolio, Programme, Project Relationship







#### **Examples of Projects**



- Projects are undertaken at all levels of the organization and they can involve a single person or many thousands.
- Their duration ranges from a few weeks to several years.
   Projects can involve one or many organizational 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	Strategy
<ul> <li>Personal integrity and reliability</li> </ul>	Governance, structures and
Personal communication	processes
Relationships and engagement	Compliance, standards and
Leadership	regulations
Teamwork	Power and interest
Conflict and crisis management	Change and transformation
Resourcefulness	Culture and values
Negotiation	
Results orientation	Source: IPMA-ICB (adapted)

#### Personal and Professional Virtues



Insightfulness Magnificence Friendliness Fairness Temperance
Prudence Generosity

Temperance
Honour Judgement Calmness Magnanimity Self-knowledge



## PM<sup>2</sup> Overview



## The Purpose of PM<sup>2</sup>



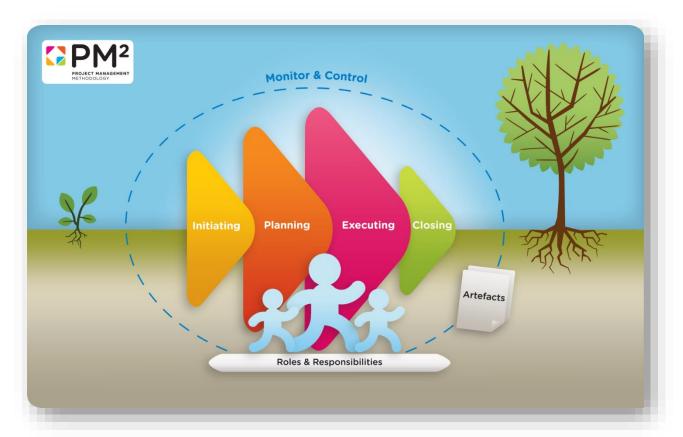
 The purpose of PM<sup>2</sup> is to enable Project Managers to deliver solutions and benefits to their organisation and customers through the effective management of project work.





## The PM<sup>2</sup> Methodology

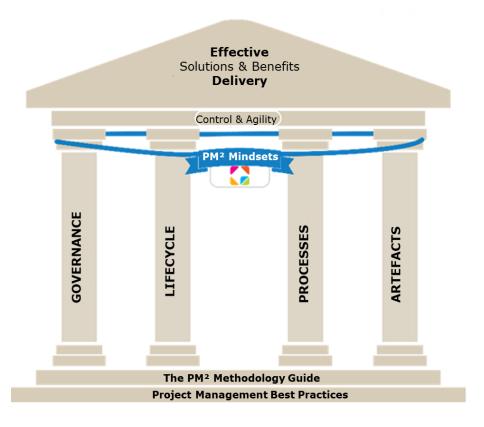






#### The House of PM<sup>2</sup>



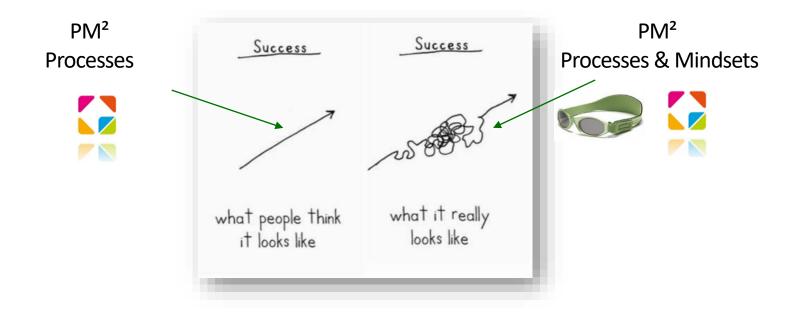




#### PM<sup>2</sup> Mindsets

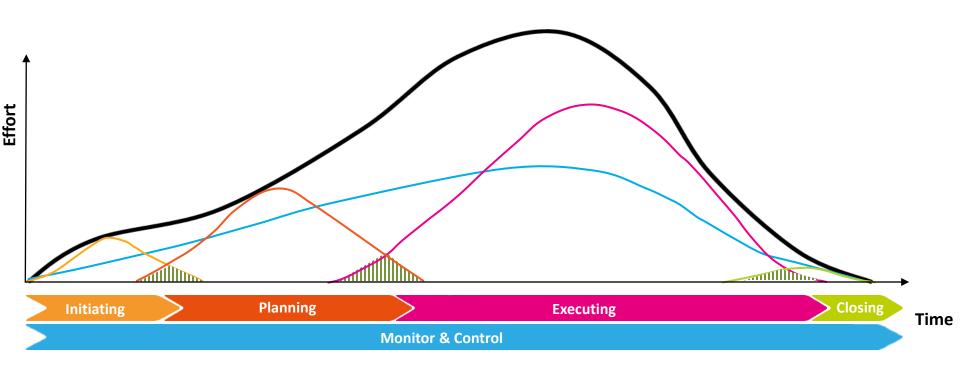


The PM<sup>2</sup> Mindsets enable us to apply the Methodology more effectively and help us navigate through the complexities of project reality.



## PM<sup>2</sup> Project Lifecycle







#### PM<sup>2</sup> Phases



PM <sup>2</sup> Phases		Description		
1	Initiating Get the project off to a good start.			
2	Planning Define products, verify the Business Case, plan work			
3	Executing	Create the project's products.		
4	Closing	User acceptance, handover to maintenance		

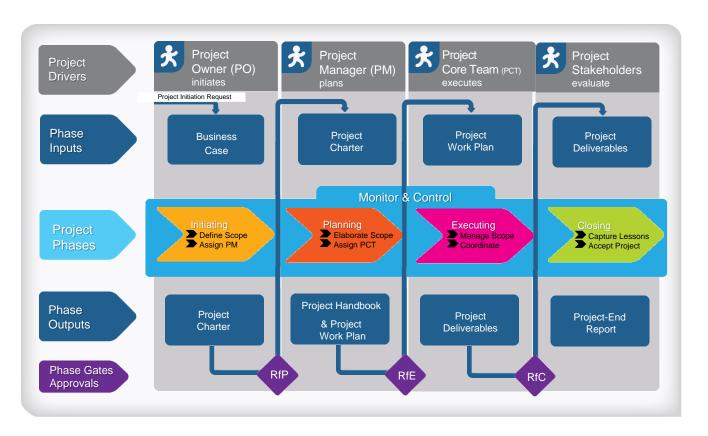
**Monitor & Control:** The Project Manager (PM) monitors & controls the work, risks, issues, quality, etc. throughout the whole project lifecycle.

	Initiating		Planning		Executing	Closing			
Monitor & Control									



#### PM<sup>2</sup> Project Lifecycle - Phases & Drivers





#### Phase Gates / Approvals



- These check points contribute to the overall project management quality.
- The three PM<sup>2</sup> (approval) Phase Gates are:
  - RfP (Ready for Planning): At the end of the Initiating Phase
  - RfE (Ready for Execution): At the end of the Planning Phase
  - RfC (Ready for Closing): At the end of the Executing Phase





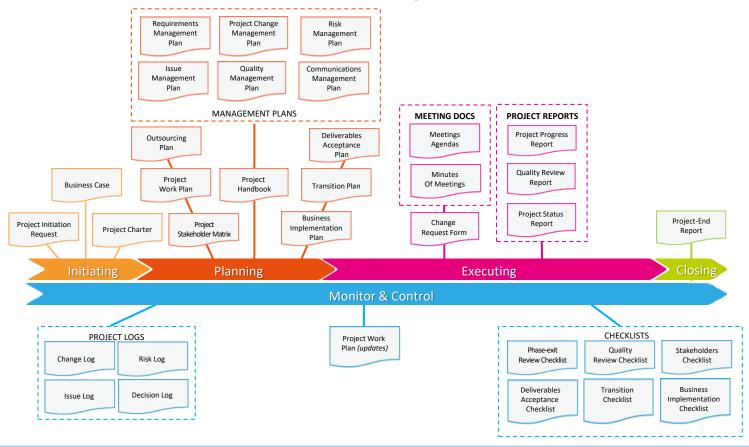
#### PM<sup>2</sup> Phases & Artefacts



#### **Planning** Executing Closing - Document the idea/need - Organise a Kick-off Meeting - Organise a Kick-off Meeting Organise a Project-End Review - Tailor the PM2 process - Coordinate project execution - Identify key stakeholders Meetina - Capture lessons learned and (and their needs) - Assign roles & responsibilities - Conduct Meetings - Create a business justification Elaborate project scope - Assure Quality post-project recommendations for the project Develop work breakdown & project - Create Project reports - Get final project acceptance - Define the project scope and schedule - Distribute information - Release project resources - Develop project plans - Ensure deliverables acceptance - Archive project information organisation - Distribute plans to stakeholders Executing Kick-Off/MoM Project-End Review Agenda/ MoM **Project Initiation Request** Planning Kick-off/ MoM Meeting Agendas/MoMs Project-End Report Project Handbook **Business Case** - Roles & responsibilities Project Progress Report - Lessons Learned **Project Charter** - Management plans **Project Status Reports** - Best Practices Project Logs (setup). - Requirements management - Post Project Recommendations Quality Review Report Project Stakeholder Matrix Project Acceptance Note Change Requests Outsourcing Plan Deliverables Acceptance Note Project Work Plan Deliverables Acceptance Plan Transition Plan **Business Implementation Plan** RfE RfC **RfP** Ready for Planning Ready for Executing Ready for Closing **Monitor & Control** Regularly updated Checklists - Monitor Project Performance - Manage Issues and Decisions Risk Log Phase-exit Review Checklist - Control Schedule - Manage Stakeholders Issue Log Quality Review Checklist - Control Cost - Manage Deliverables Acceptance **Decision Loa Deliverables Acceptance Checklist** - Manage Quality - Manage Transition - Manage Requirements Change Log Transition Checklist - Manage Business Implementation - Manage Project Change Project Work Plan Business Implementation Checklist - Manage Outsourcing - Manage Risks Requirements Document Stakeholder Checklist

### The PM<sup>2</sup> Artefacts Landscape







## **Tailoring**



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



#### The purpose of documentation is to...



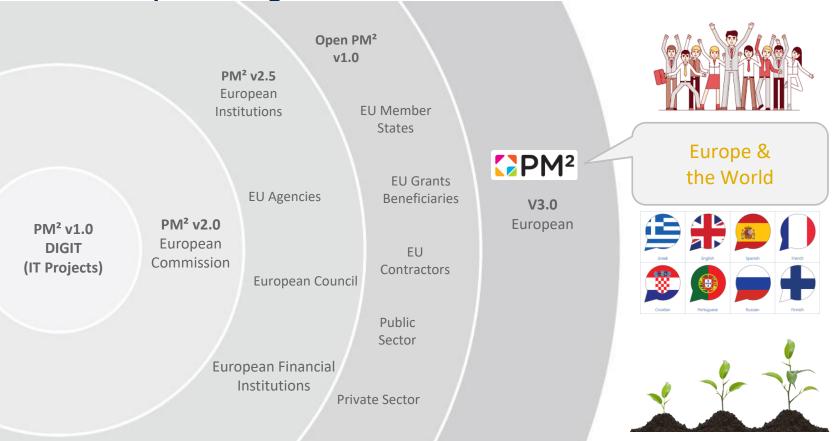
- Help people think something through
- Provide a clear picture of the project requirements.
- Facilitate communication.
- Facilitate agreement by all project stakeholders.
- Offer a baseline for the monitoring & controlling.
- Document important decisions made (and track changes).
- Respond to Audit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





## The Expanding Reach of PM<sup>2</sup>

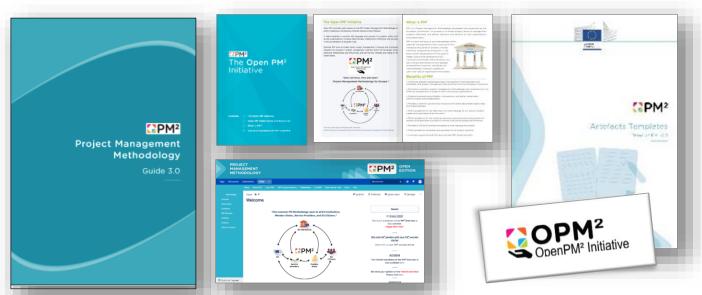


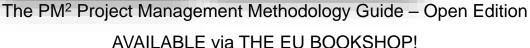




#### The PM<sup>2</sup> Guide – V3.0







https://webgate.ec.europa.eu/fpfis/wikis/display/openpm2 https://joinup.ec.europa.eu/community/opm2



## **Project Governance**



#### A PM<sup>2</sup> Project



# Business Development Aspect Aspect

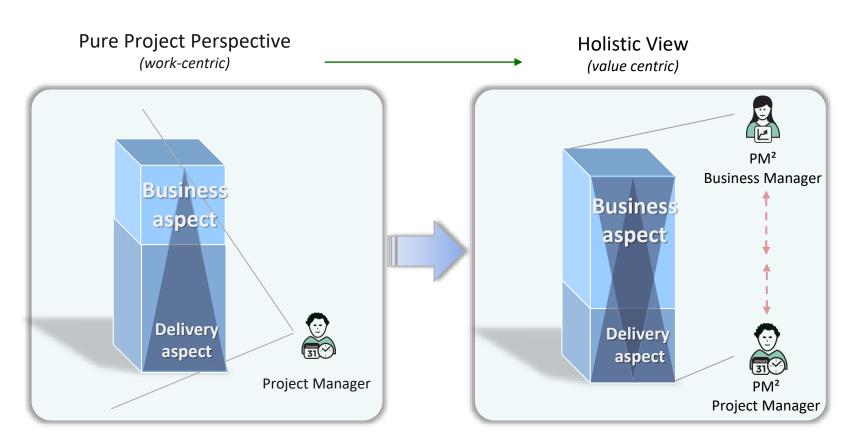
- Is (above all) a project (i.e. not operations, not a work activity, not a programme etc.).
- has a duration of more than 4–5 weeks and involves more than 2–3 people.
- runs within an organisation and can be subject to internal or external audits.
- requires a clearly defined governance structure and 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.



## A Shift in Perspective

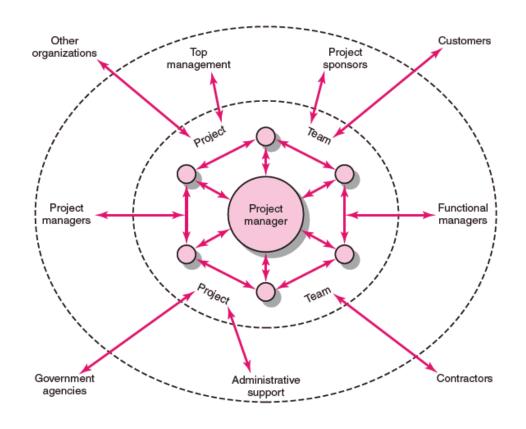






#### ...a Network of Stakeholders

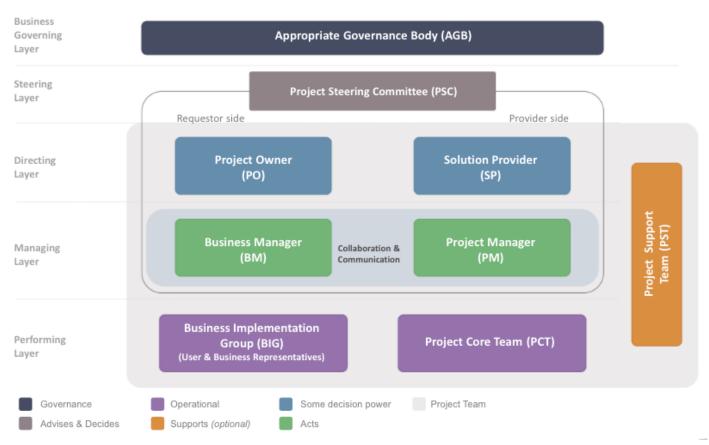






### The PM<sup>2</sup> Governance Model



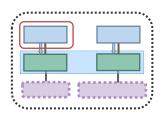




### The Project Owner (PO) Role



- Acts as the project <u>sponsor</u>
- <u>Chairs</u> the Project Steering Committee (PSC)
- Accepts the business objectives
- Owns project business risks
- Monitors project progress regularly (high level)
- Mobilises resources (a.k.a. budget)
- Provides <u>leadership</u> and strategic direction
- <u>Assures</u> that project outcomes are in line with the business objectives
- Approves all key management Artefacts

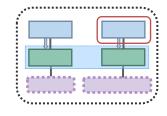




### The Solution Provider (SP) Role



- Assumes the <u>overall accountability</u> for project deliverables/services requested by the Project Owner (PO)
- May <u>help</u> the Project Owner (PO) to establish the Business Case and objectives for the project
- Represents the interests of those designing, developing, facilitating, procuring, implementing, and possibly operating and maintaining the project output (e.g. IT System)
- Agrees on objectives for the <u>provider activities</u> and approves the Contractors' deliverables for the project
- Mobilises the needed resources from the provider side and appoints the PM



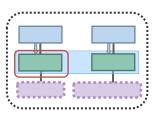


### The Business Manager (BM) Role

PM<sup>2</sup>

- Acts on a daily basis on behalf of the Project Owner (PO)
- Drives the definition of business and project <u>objectives</u>
- Manages the business activities of the project and coordinates the User Representatives
- Leads the <u>implementation of the business changes</u> as defined by the project
- Ensures that the client organisation is ready to accommodate and use the final project outputs
- Ensures that the Project outputs produce the expected results (outcomes and benefits)







### The Project Manager (PM) Role

PM<sup>2</sup>

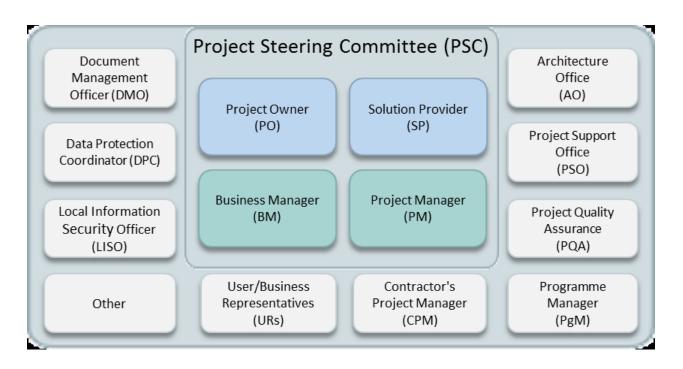
- Assumes responsibility for project deliverables
- Proposes and executes the project plans as approved by Project Steering Committee (PSC)
- Daily manages and coordinates the Project Core Team (PCT) activities and resources
- Ensures that project objectives are achieved within the quality, time, and cost objectives
- Manages stakeholder's expectations
- Ensures that all key management artefacts are delivered and approved by the Project Owner (PO)
- Communicates and reports project progress to the Project Steering Committee (PSC)
- Performs risk management for project related risks (non-business)
- Ensures the interoperability and integration of the different project related deliverables, systems, services and applications





### Project Steering Committee (PSC)





						_			
Initiating	AGB	PSC	PO	BM	BIG	SP	PM	PCT	
Project Initiation Request	- 1	n.a.	A/S	R	s/c	- 1	n.a.	n.a.	
Business Case	- 1	С	Α	R	С	S	S	n.a.	
Project Charter	- 1	Α	С	S	С	S	R	С	
Planning	AGB	PSC	PO	вм	BIG	SP	PM	PCT	
Planning Kick-off Meeting	I	Α	С	S	С	С	R	С	
Project Handbook	- 1	- 1	Α	S	С	- 1	R	С	
,								-	
Project Work Plan	I	Α	С	s/c	С	С	R	S/C	L
									_
Deliverables Acceptance Plan	- 1	Α	С	5		С	R	С	
Transition Plan	- 1	Α	С	С	С		R	С	
Business Implementation Plan	- 1	- 1	Α	R	С	- 1		1	
Management Plans									
Requirements Management Plan	- 1	- 1	Α	С	С	- 1	R	S	
Project Change Management Plan	- 1	- 1	Α	С	- 1	- 1	R	1	
Risk Management Plan	- 1	С	Α	С	- 1	- 1	R	1	
Issue Management Plan	I	- 1	Α	С	С	- 1	R	С	
Quality Management Plan	- 1	Α	С	С	С	С	R		
Communications Management Plan	- 1	- 1	Α	S	С	- 1	R	С	
Executing	AGB	PSC	PO	вм	BIG	SP	PM	PCT	
Executing Kick-off Meeting	- 1	Α	С	s/c	С	С	R	С	
Project Coordination	- 1	- 1	Α	S	- 1	- 1	R	1	
Quality Assurance	- 1	- 1	- 1	S	С	- 1	Α	R	
Project Reporting	- 1	- 1	Α	s/c	I/C	I/C	R	С	
Information Distribution	- 1	- 1	Α	С	- 1	- 1	R	С	
Monitor & Control	AGB	PSC	PO	BM	BIG	SP	PM	PCT	
Monitor Project Performance	- 1	- 1	Α	С	С	- 1	R	С	
Control Schedule	- 1	- 1	Α	С	С	- 1	R	С	
Control Cost	- 1	- 1	Α	С	С	- 1	R	С	
Manage Stakeholders	- 1	- 1	Α	s/c	- 1	С	R	- 1	
Manage Requirements	- 1	- 1	Α	С	С	- 1	R	S	
Manage Project Changes	- 1	С	Α	S	- 1	- 1	R	С	
Manage Risks	- 1	С	Α	s/c	С	- 1	R	С	
Manage Issues & Decisions	- 1	- 1	Α	S	С	- 1	R	С	
Manage Quality	- 1	- 1	- 1	s/c	С	Α	R	С	
Manage Deliverables Acceptance	- 1	- 1	Α	S	С	С	R	С	
Manage Business Implementation	- 1	- 1	Α	R	С	- 1	S	1	
Manage Transition	- 1	Α	С	С	С	С	R	С	
Manage Outsourcing	Α	С	С	С	- 1	S	R	1	
Closing	AGB	PSC	PO	BM	BIG	SP	PM	PCT	
Project-End Review Meeting	- 1	Α	С	S	С	С	R	С	
Project-End Report	- 1	Α	С	S	С	С	R	С	
Administrative Closure	I	С	Α	С	ı	С	R	I	
								_	



PM<sup>2</sup> Artefacts & Activities Overview RAM (RASCI)

Steering Committee: accountable for the Work Plan?

Project owner: almost full accountability

Project Manager: does the work but is NOT accountable

### Summary – Roles & Responsibilities



- The PM<sup>2</sup> 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<sup>2</sup> Mindsets



#### The PM<sup>2</sup> Mindsets





Apply PM2 best practices to manage their projects.

The PM $^2$  Mindsets are reminders of effective behaviours and attitudes. They provide a common set of beliefs and values for all PM $^2$  teams, helping them navigate through the complexities of project reality.



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



Balance in the most productive way the oftenconflicting project management "Ps" of: product, purpose, process, plan, people, pleasure/pain, participation,



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.



### PM<sup>2</sup> 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: We develop a clear and shared project vision. We manage using a holistic approach and optimize the whole project, not just parts. We follow a process but stay Agile, and we frequently "remember why" we were doing something in the first place.
- Do we know why we are doing it? Does anyone really care?
  - Tip: We make sure our project matters; we understand its goals, its value and impact, and how it relates to the overall organisational strategy. We define (upfront) what project success is and we deliver maximum value and real benefits, not just outputs.
- Do we know who is doing what?
  - Tip: Know what you should do, and make sure others know as well. Is it clear to everyone? We clearly
    define and understand roles, responsibilities and accountabilities.
- Deliver at any cost or risk?
  - Tip: We show respect for people's effort and EC funds and avoid high risk behaviours and tactics. We always keep in mind that it's not just about the end-result, it matters how we get there. We manage our projects with values and principles.



### PM<sup>2</sup> Mindsets: IAQs (Questions for the Brave!)



#### ... and then ask some more important questions:

- Is this a task for the business or the provider team?
  - Tip: We make sure that "client" and "provider" people work as ONE team for the same goal. Real teamwork really works! We foster clear, effective and frequent communication.
- Should I be involved?
  - Tip: Remember to contribute from any position. Be proud of the skills, the value, and the positive attitude you bring to the project. Help everyone who needs to be involved get involved. Promote and facilitate the contribution of all stakeholders.
- Have we improved?
  - Tip: We commit to on-going self-improvement and organizational improvement through the creation and sharing of knowledge. As project teams, we reflect on how to become more effective, and adjust our behaviour accordingly.
- Is there life after project?
  - Tip: The product life(cycle) has just begun!
     We make sure that we contribute 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<sup>2</sup> Methodology



•They help us navigate the complexities of managing projects at the EC and make PM² effective and complete

Together

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





### Phases and Artefacts

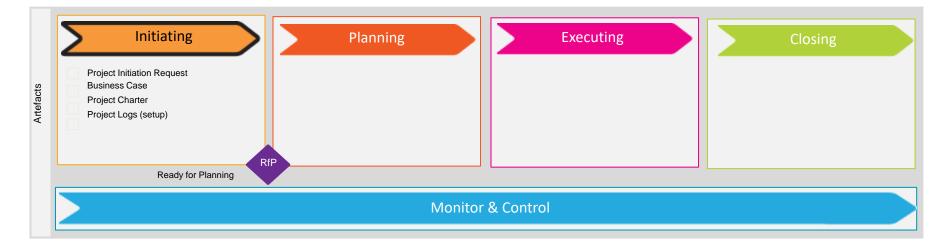


## **Initiating Phase**



Initiating



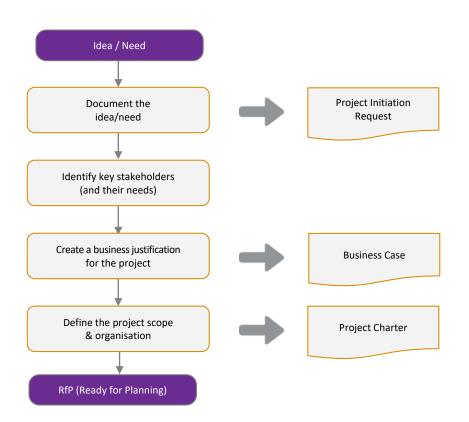




### What happens in the Initiating Phase?



Initiating

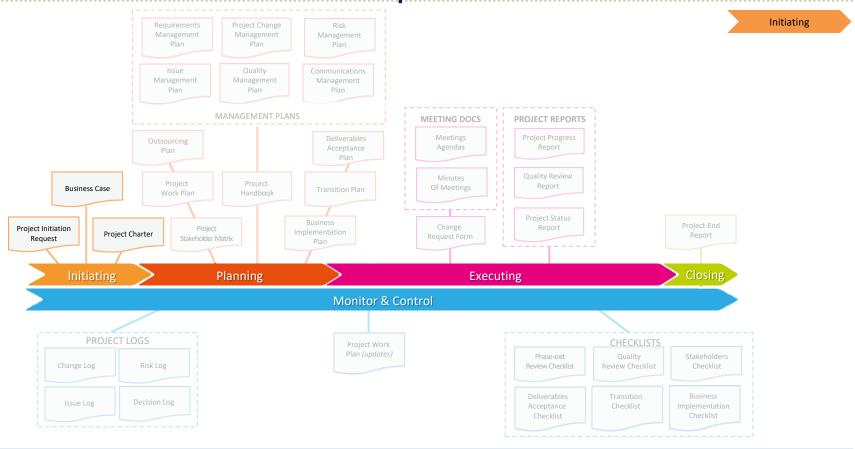


- Objectives
- Preliminary planning
- Documentation, Approvals & phase gate



### The PM<sup>2</sup> Artefacts Landscape





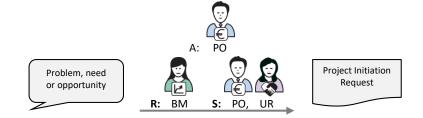
### **Project Initiation Request**



### Purpose

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





#### **RASCI**

RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Project Initiation Request	I	N/A	A/S	R	<b>S</b> /C	ı	N/A	N/A



## **Project Initiation Request**



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2.1 2.2 2.3	PROJECT DESCRIPTION
2.1 2.2 2.3 2.4	PROJECT DESCRIPTION
2 2.1 2.2 2.3 2.4 2.5	PROJECT DESCRIPTION





#### **Business Case**

# PM<sup>2</sup>

#### Purpose

- Capture the reasoning for the project.
- Provide the justification for the project and establishes its budgetary constraints.
- Provides information to determine whether the project should move ahead or not.





Project Initiation Request





Business Case

#### **RASCI**

RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Business Case	ı	С	Α	R	С	S	S	N/A



### **Business Case**



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### **Project Charter**



#### Purpose

• The charter is a key element of the project approval process (along with the Business Case). It includes the what, how and when fundamentals of the project



Project Initiation Request



Business Case





Project Charter

#### **RASCI**

RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Project Charter	ı	Α	С	S	С	S	R	С

# **Project Charter**



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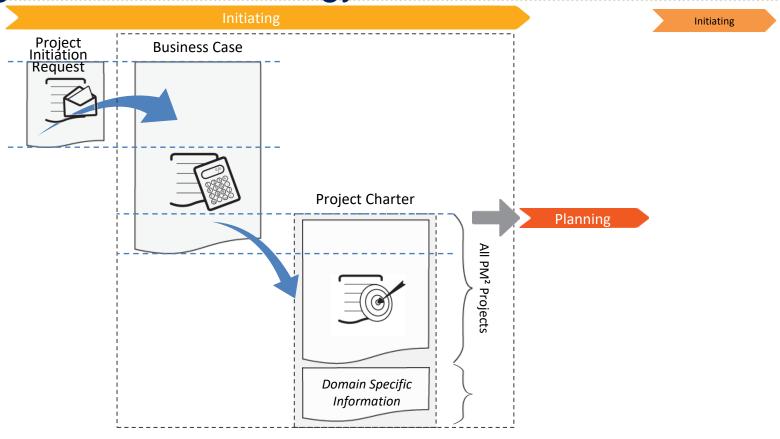
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## **Initiating Documents Strategy**

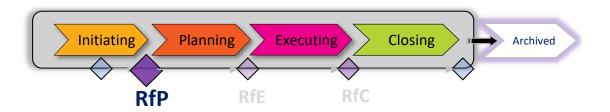


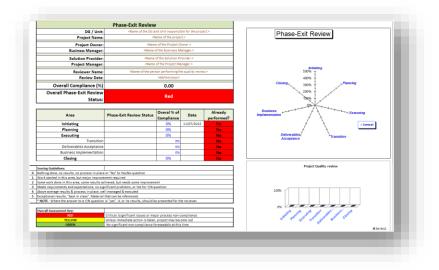


### Phase Gate: RfP (Ready for Planning)?



Initiating





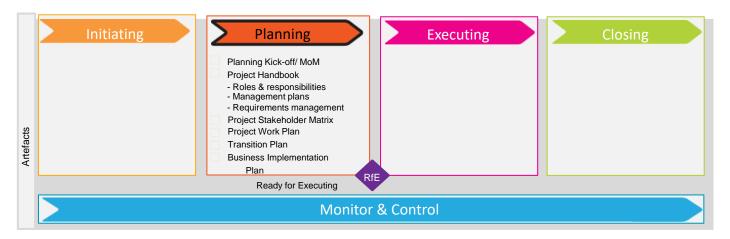


### Planning Phase



Planning



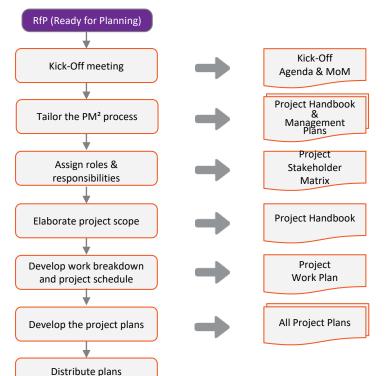




### What happens in the Planning Phase?



Planning



- Develop the project scope statement
- Determine the appropriate methods for the project.
- Develop the schedule for the various tasks and estimate the necessary resources.
- Develop the various project plans for the project.

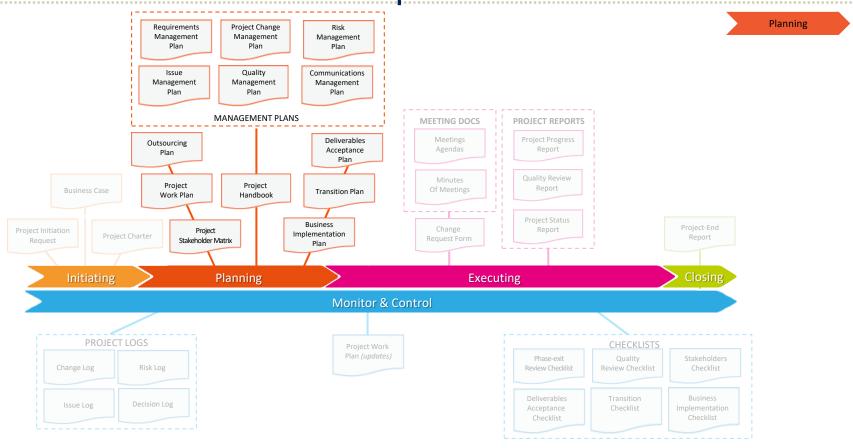


to stakeholders

RfE (Ready for Executing)

### The PM<sup>2</sup> Artefacts Landscape





### Project Handbook



**Planning** 

### Purpose

- Summarizes the project objectives.
- Documents the overall management approach.
- Defines the key controlling processes, the project policies and rules.
- The Project Handbook defines the outputs of the planning.

• The Project Handbook becomes the basis for managing the project throughout its lifecycle and is

an important point of reference.







**Business Case** 





Project Handbook

#### **RASCI**

RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Project Handbook	ı	ı	Α	S	С	ı	R	С





# Project Handbook



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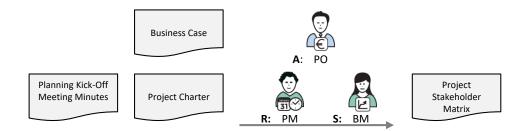
### Project Stakeholder Matrix



### Purpose

 List all the people (or groups) involved in (or influential to) the project during the Project Mode (all known people from the requestor or provider side of the project) and their role.





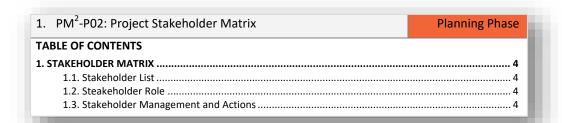
#### **RASCI**

RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Project Stakeholder Matrix	ı	ı	Α	S	С	ı	R	С



# Project Stakeholder Matrix







<b>⊘PM</b> <sup>2</sup>	PM² Logs V.2.	.0.1 (Ma	ay 201	13)				Si	tak	eh	olo	ler	M	atr	ix <	Pro	oje	ct N	lar	ne:	>										0		
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DG Unit Team	Name	notes	_	Appropriate Governance Body (AGB)	Steer	Project Core Learn (PCI)	Business Impler		Project Owner (PO)	Business Manager (BM)	Solution Provider (SP)	Project Manager (PM)		_	Assistant Project Manager	Project Quality Assurance (PQA) Contractor Project Manager (CPM)		User Representative (URs)	User	Business Analyst	Support	Consultant		Leader of Application Mgmt	Leader of Sys	Architectur	Functional Architect		_	Analys, Programmer Release Manager	Comm	ents	
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### **Project Work Plan**



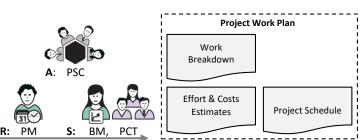
#### Purpose

- Identifies and organises the project into activities, sub-tasks, and work packages.
- Establishes a base to estimate the duration of the project.
- Determine the required resources and schedule the work.

**Business Case** 

**Project Charter** 

Used as the basis to monitor the progress and control the project.





RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Project Work Plan	ı	Α	С	<b>S</b> /C	С	С	R	<b>s/</b> C





# **Project Work Plan**

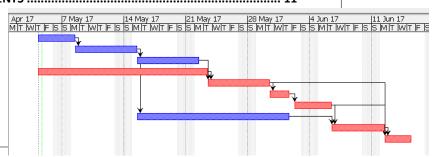


Planning



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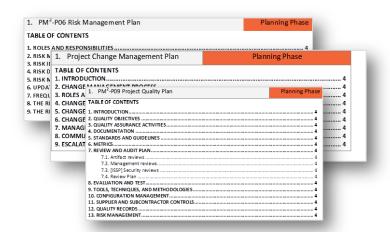
### Planning: The PM<sup>2</sup> Management Plans



**Planning** 

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







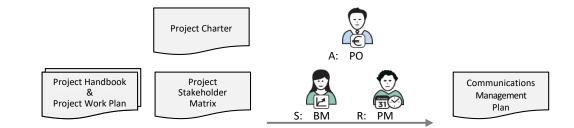
### Communication Management Plan



### Purpose

- Ensure that the <u>Project Core Team and all the Project Stakeholders will have the information they need</u> to do their jobs.
- Define the frequency, format, and results of all the communication with both the performing and the participating organisation.



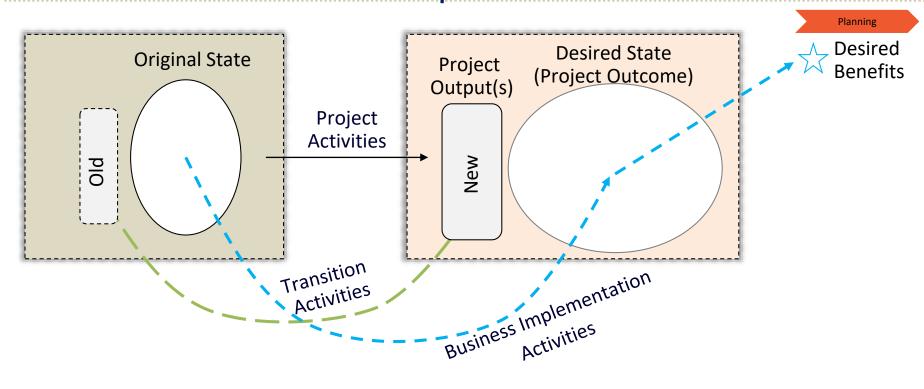


#### **RASCI**

RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Communication Management Plan	ı	ı	Α	S	С	ı	R	С

## Transition vs Business Implementation





Transition deals with continuity,
Business Implementation with change



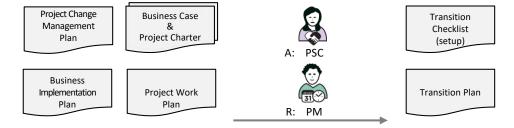
#### **Transition Plan**



Planning

#### Purpose

 Define the pre-requisites of rolling out the new solution, system, project deliverables. This is useful to ensure the smooth transition from the "project" to the "going live" mode.



RAM (RASCI)	AGB	PSC	PO	ВМ	UR	SP	PM	PCT	
Transition Plan	I	Α	С	С	С	С	R	С	

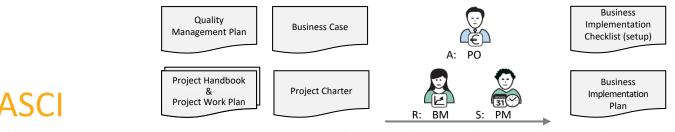
### **Business Implementation Plan**



Planning

#### Purpose

- Outlines the impact of the project on the organisation
- <u>Define the change management activities</u> that need to take place.
- The organisation must assure project outputs are effectively integrated into the organization.
- Integrate business implementation activities in the Project Work Plan
- Define <u>post-project change activities</u>.



RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Project Work Plan	I	I	A	R	С	I	S	I



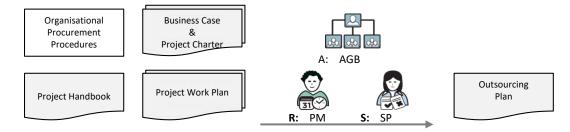
### Outsourcing Plan



#### Planning

#### Purpose

- Ensures that outsourced products and/or services outside the EC fulfils the project needs.
- Identifies the contracting strategies that will be used,
- Outlines the scope of products and/or services to be contracted,
- Identifies responsibilities for the full contract lifecycle.



RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Outsourcing Plan	Α	С	С	С	ı	S	R	ı

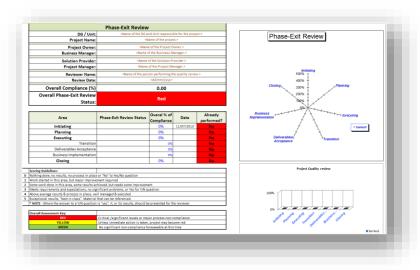


### RfE (Ready for Executing)?



Planning

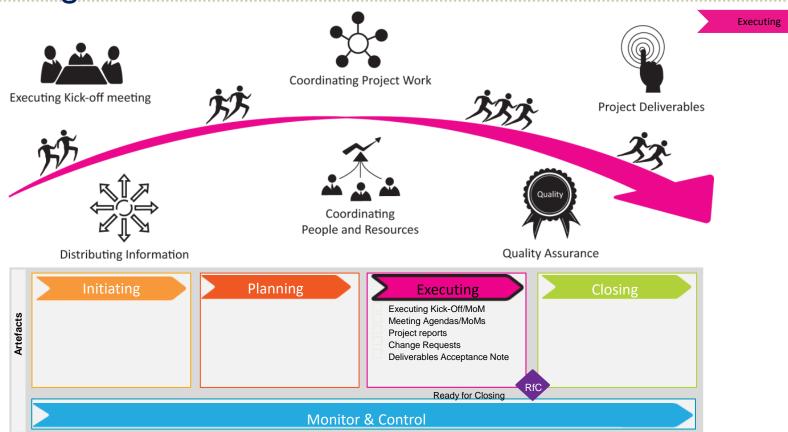






## **Executing Phase**



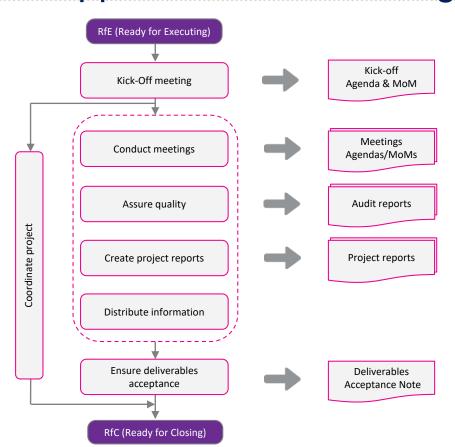




### What happens in the Executing Phase





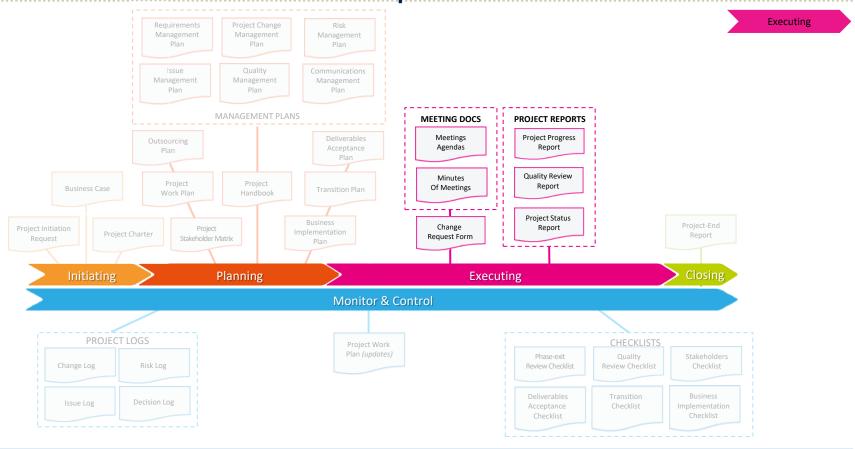


- Coordinating project work
- Coordinating people and resources,
- Execute various project plans.
- Reporting on the project progress Producing the project deliverables.



### The PM<sup>2</sup> Artefacts Landscape







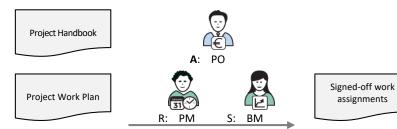
### **Project Coordination**



Executing

#### Purpose

• Facilitate the project's progress by continuously providing information to the Project Core Team (PCT) and supporting the completion of assigned work.



RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Project Coordination	ı	ı	Α	S	ı	ı	R	ı

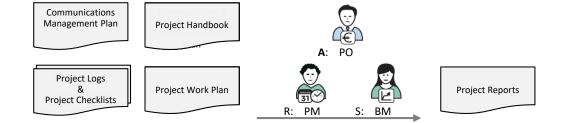
### **Project Reporting**



Executing

#### Purpose

• <u>document and summarize the status of various dimensions of the project progress</u> for the purpose of communicating it with relevant project Stakeholders.



RAM (RASCI)	AGB	PSC	PO	ВМ	UR	SP	PM	PCT
Project Reporting	ı	I	Α	<b>s/</b> C	I/C	I/C	R	С

#### PM<sup>2</sup> Project Reports



1. Project Progress Report

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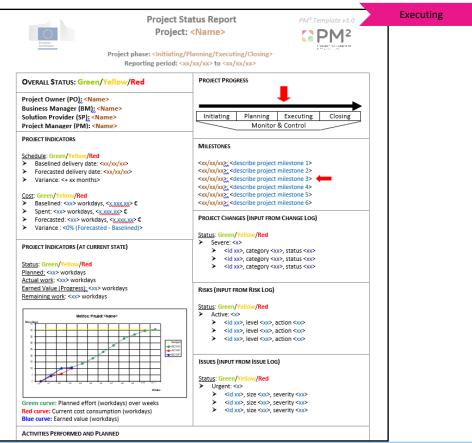
3. PROJECT PLAN PER WORK PACKAGE (ONLY FOR THOSE HAVING A C 4. RISK LIST

5. ACHIEVEMENTS

6. ONGOING AND PLANNED ACTIONS

7. MAJOR ISSUES & ACTIONS TAKEN

8. ANNEX





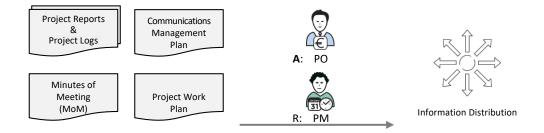
#### Information Distribution



Executing

#### Purpose

 Information distribution is based on the Communications Management Plan and aims to regularly communicate key information to Project Stakeholders.



RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Project Reporting	ı	ı	Α	С	l	ı	R	С

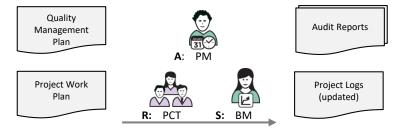
### **Quality Assurance**





#### Purpose

Quality Assurance activities as described in the Quality Management Plan are executed.
 Quality Assurance (QA) in projects refers to the systematic activities implemented to ensure that quality requirements are fulfilled. All QA activities are planned in order to provide enough confidence that the product will satisfy the given requirements for quality.

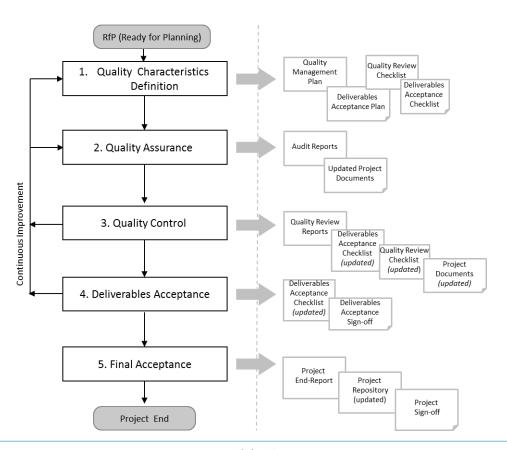


RAM (RASCI)	AGB	PSC	PO	ВМ	UR	SP	PM	PCT
Quality Assurance	ı	I	I	S	С	ı	Α	R

## The PM<sup>2</sup> Quality Management Process



Executing

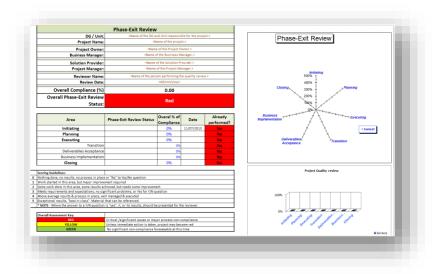


## RfC (Ready for Closing)?



Executing





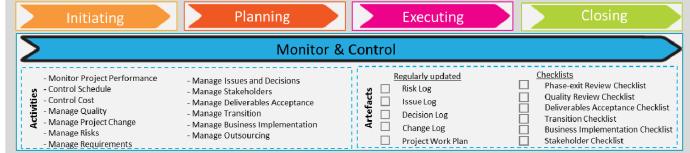


#### **Monitor & Control**



Monitor & Control







### What happens During Monitor & Control



Monitor & Control

During Monitor & Control all work is observed from the point of view of the Project Manager. The key activities in Monitor & Control are listed below:

- Tracking and controlling of project variables (time, cost, resource use, risk...).
- Managing of issues, risk and changes.
- Quality controlling performed as described in the quality plan.
- Controlling of project deliverables so that they meet the predefined objectives.
- Ensuring that the transitions of the project to production will be done in a smooth way.



#### **Monitor & Control Activities**



Monitor & Control

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



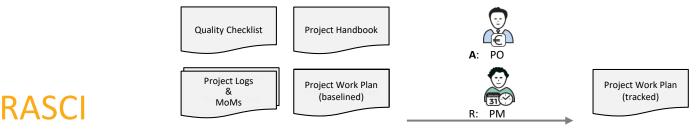
### Monitor Project Performance





#### Purpose

- Monitor the project performance in order to <u>be in a position to know</u> whether the project is <u>advancing satisfactorily</u>.
- <u>Tracks project variables</u> (i.e. cost, schedule, scope and quality), monitor's risks, project change and overall project performance, as to be in a position to report and forecast project evolution to the project Stakeholders.



RAM (RASCI)	AGB	PSC	PO	ВМ	UR	SP	PM	PCT	
Monitor Project Performance	I	I	Α	С	С	I	R	С	



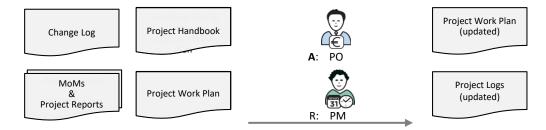
#### **Control Schedule**





#### Purpose

- Ensure that tasks are executed <u>as scheduled</u> and the deadline for the project can be achieved.
- Inform stakeholders about (foreseen) delays.
- Obtain task status information from the Project Core Team (PCT)
- Update <u>Project Work Plan</u>.



RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT	
Control Schedule	I	I	Α	С	С	I	R	С	

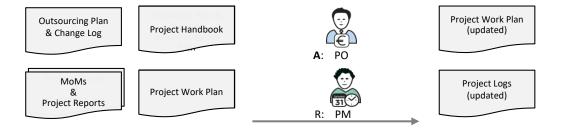
#### **Cost Control**





#### Purpose

- Ensure that actual project cost remain aligned with project budget.
- Monitor the budget and track the difference between budgeted, actual and forecast costs.
- Report important variances through the status report
- Obtain approval from the Project Owner (PO) for deviations



#### **RASC**

RAM (RASCI)	AGB	PSC	PO	ВМ	UR	SP	PM	PCT
Control Cost	ı	ı	Α	С	С	ı	R	С

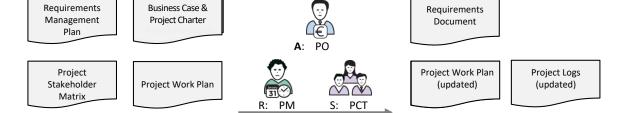
### Manage Requirements



Monitor & Control

#### Purpose

• Gather, document, validate requirements and control their implementation and change.

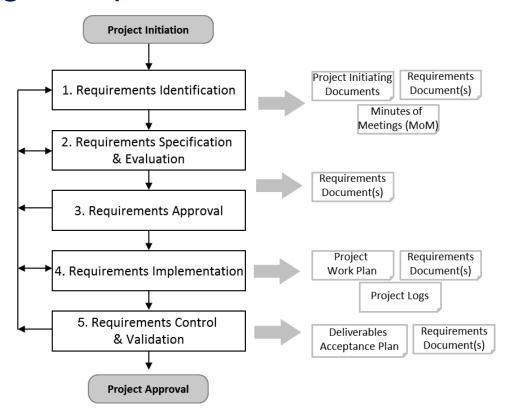


RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Manage Requirements	I	I	Α	С	С	ı	R	S

### Manage Requirements



Monitor & Control



### Manage Project Changes

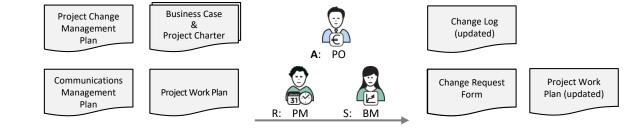




#### Purpose

• Identify, document, assess, approve, prioritise, planning and controlling project changes, and communicating 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.

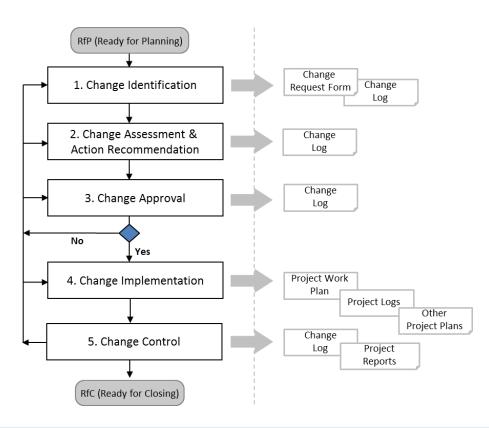


RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT	
Manage Project Changes	ı	С	Α	S	I	I	R	С	

## Manage Project Changes



Monitor & Control



### Manage Issues & Decisions

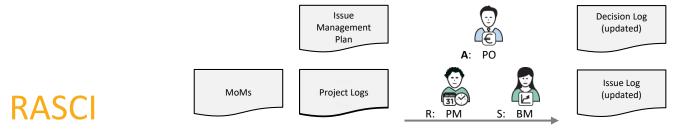




#### Purpose

Identify, evaluate and manage issues for resolution by Project Stakeholders.

An **issue** is an immediate problem requiring resolution. Anyone can raise issues and issues can be raised in team meetings or via communication towards the Project Manager (PM). Issues must be resolved as soon as possible. It is always important to solve the root cause, not the symptom. This will ensure that the problem will not reoccur.

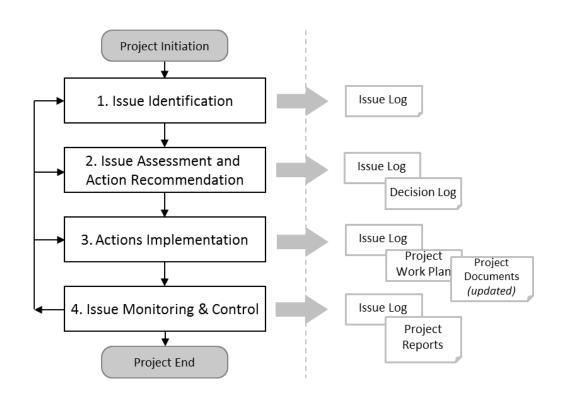


RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Manage Issues & Decisions	ı	I	Α	S	С	ı	R	С

### Manage Issue & Decisions



Monitor & Control



### Manage Risk



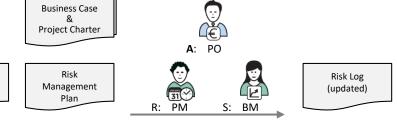


#### Purpose

- identify, assess and manage risks so that they conform to the organisation's accepted risk attitude.
- improve 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 effect on the achievement of project objectives.

Risk Log

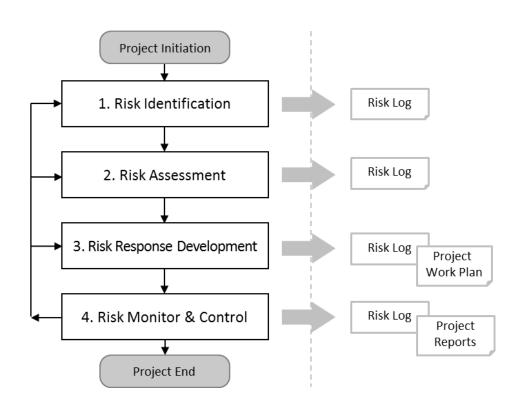


RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Manage Risk	I	С	A	<b>S</b> /C	С	I	R	С

## Manage Risk



Monitor & Control



### Manage Stakeholders



Monitor & Control

#### Purpose

- Identifying project stakeholders
- Capture stakeholder's project expectations and requirements
- Communicating with projects stakeholders throughout project lifecycle
- Capturing 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).











Communications Management Plan

Business Implementation Plan



S: BM

Issue and Decision Logs Stakeholder Checklist

RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Manage Stakeholders	ı	ı	Α	<b>S</b> /C	ı	С	R	1

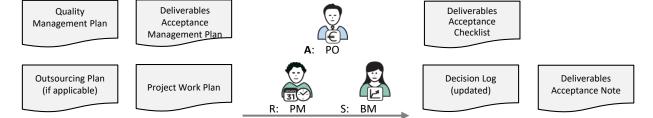
### Manage Deliverable Acceptance





#### Purpose

 To ensure formal accept of project deliverables based on predefined objectives and set of criteria as defined in the Deliverables Acceptance Plan



RAM (RASCI)	AGB	PSC	PO	ВМ	UR	SP	PM	PCT
Manage Deliverable Acceptance	ı	I	Α	S	С	С	R	С



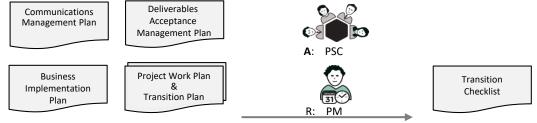
### Manage Transition





#### Purpose

- To 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.
- Management of any relevant communication activities
- Ensure close cooperation between the Project Manager (PM) and the Business Manager (BM)



RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Manage Transition	ı	Α	С	С	С	С	R	С



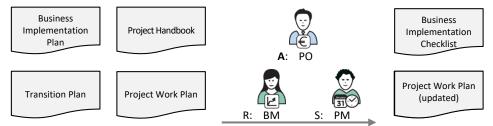
## Manage Business Implementation





#### **Purpose**

- The effective execution of all business implementation activities, critical for smooth operations, even after the project's outputs have been delivered to the stakeholder/user community.
- It's a good practice to also define some <u>post-project change activities</u>, however, their implementation falls outside the domain of responsibilities of the project



RAM (RASCI)	AGB	PSC	PO	ВМ	UR	SP	PM	PCT
Manage Business Implementation	ı	I	Α	R	С	I	S	ı



### Manage Outsourcing

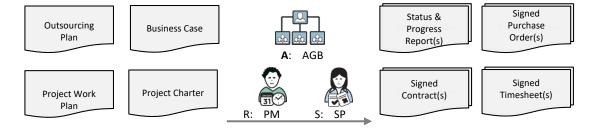




#### Purpose

• To ensure with the Contractor's Project Manager (CPM) that the Contractor delivers acceptable quality of work as defined in the Outsourcing Plan.

Note that the EC procurement process supersedes this guideline.

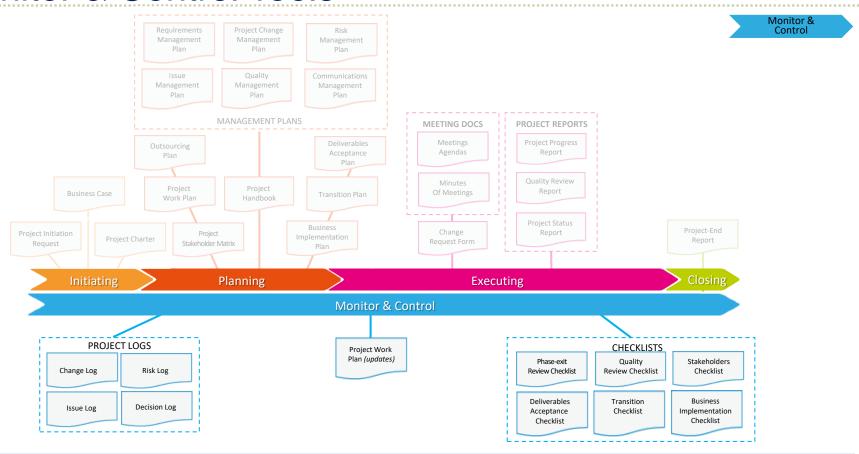


RAM (RASCI)	AGB	PSC	РО	ВМ	UR	SP	PM	PCT
Manage Outsourcing	Α	С	С	С	ı	S	R	1

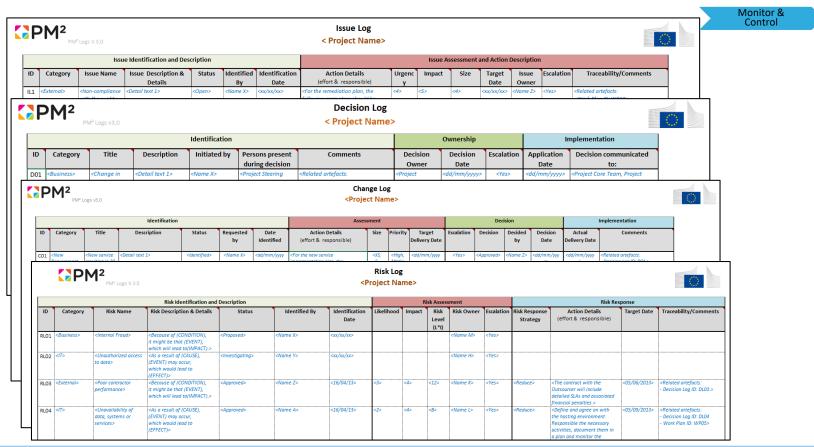


#### **Monitor & Control Tools**











## Summary – Monitor & Control



Monitor & Control

- Monitor project performance
- Control Project variables (compared to plans)
- Use Project Logs to control the project
- Execute all Project Management Plans (Processes)
- Take corrective action -> update plans



## **Closing Phase**



Closing













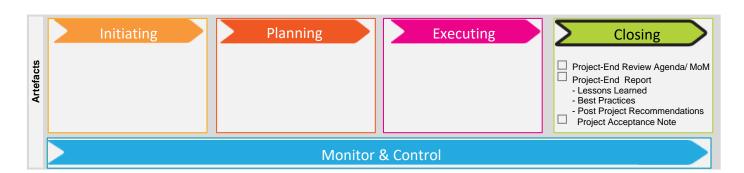


Project-End Review: meeting

Lessons Learned

**Best Practices** 

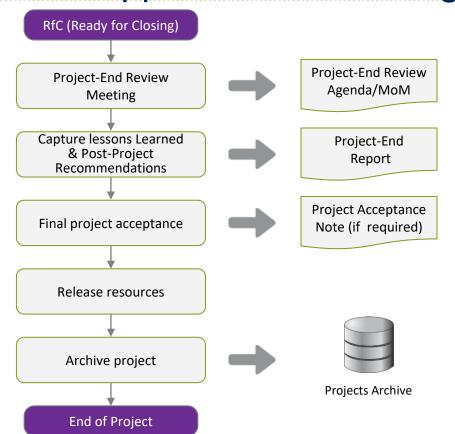
Administrative Closure



### What happens in the Closing Phase



Closing

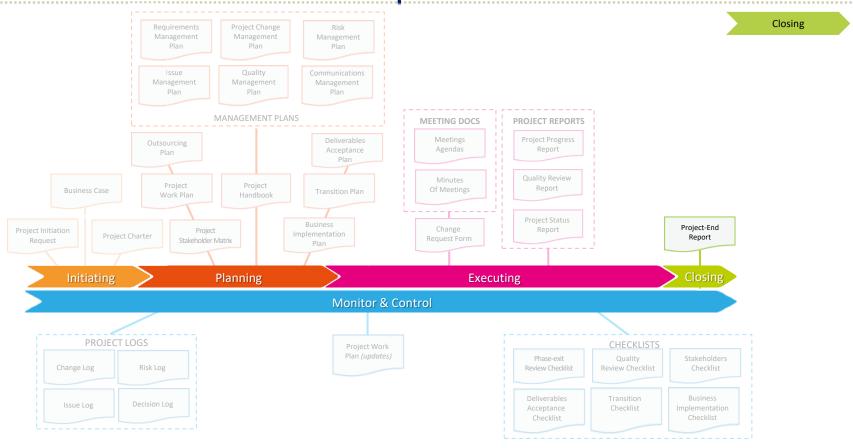


- Transfer deliverables to Project Owner
- Finalises all activities
- Formally close the project.
- Discuss to evaluate project performance
- Capture Lessons Learned and Best Practices in the Project-End Report



### The PM<sup>2</sup> Artefacts Landscape





# Wrap-up



### Course End: Lessons Learned (& Shared)



- What are you 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!

<u>Contact Us</u> or use the #madewithPM2 tag on your socials

