CoEPM² European Commission

Centre of Excellence in PM² presents

OpenPM² 2018 CONFERENCE

Brussels, Charlemagne | February 1 & 2

Introduction to PM²

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European Commission

Council of the European Union

European Committee of the Regions

EUROPEAN CENTRAL BANK EUROSYSTEM

European Union EXTERNAL ACTION

Course Agenda

- Introduction & context
- Governance model
- Project lifecycle
- Processes & Artefacts
- Mindsets

PM² Resources: Publications

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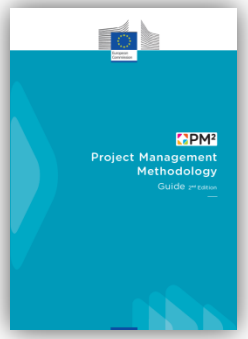
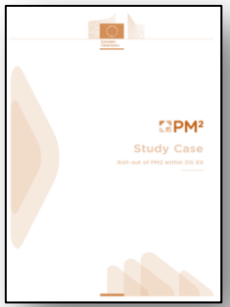
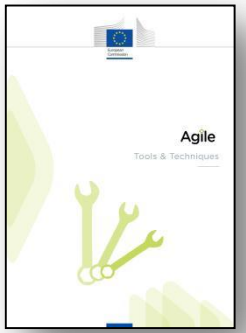
Guides



Study Materials



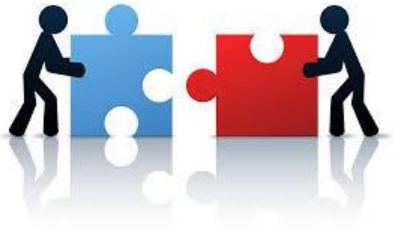
Tools & Techniques



What is a Project?

A project "is a temporary organization setup to create a unique product or service (output) within certain constraints such as time, cost, and quality.

Temporary	Unique	Output	Constraints
Start & End	Non routine	Product or Service	Time, Cost, Quality…

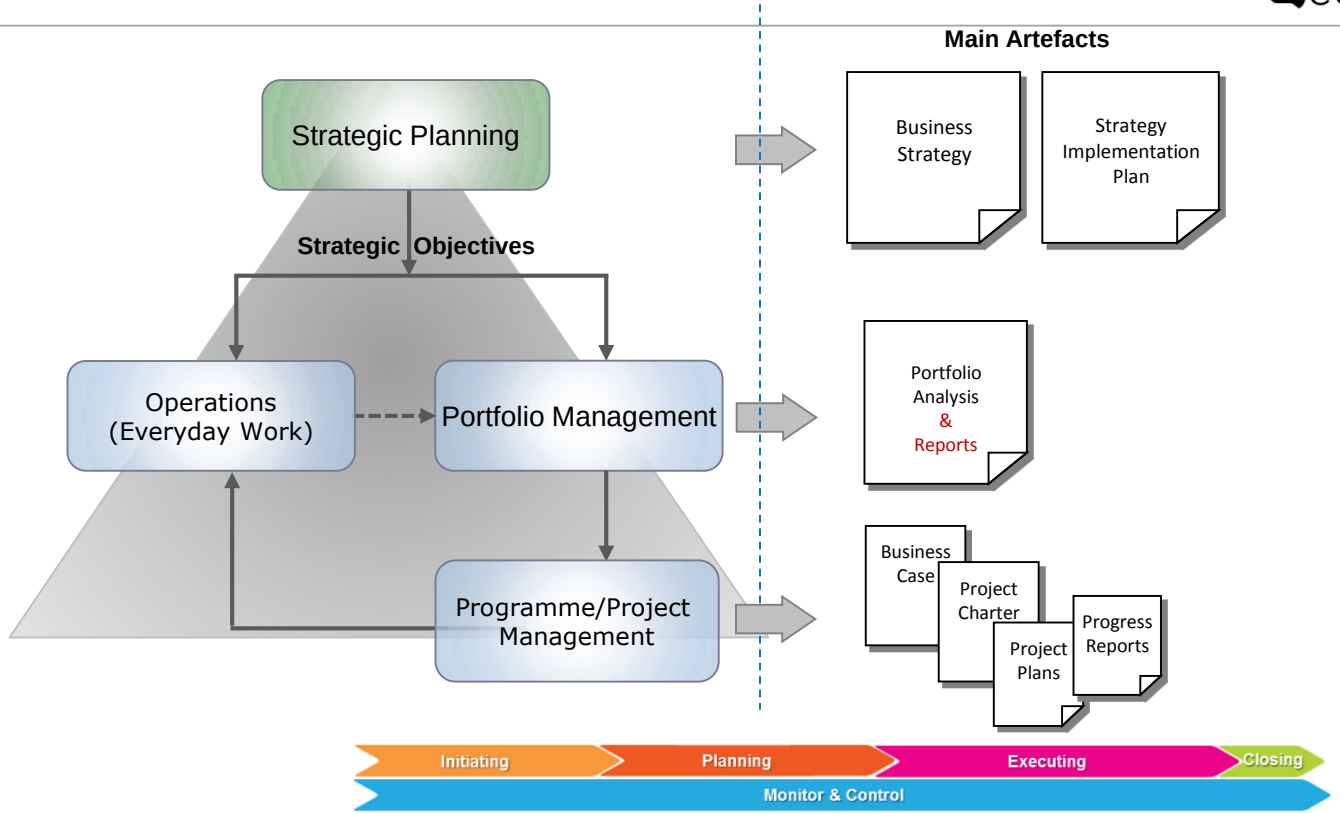


Project Outputs, Outcomes, Benefits

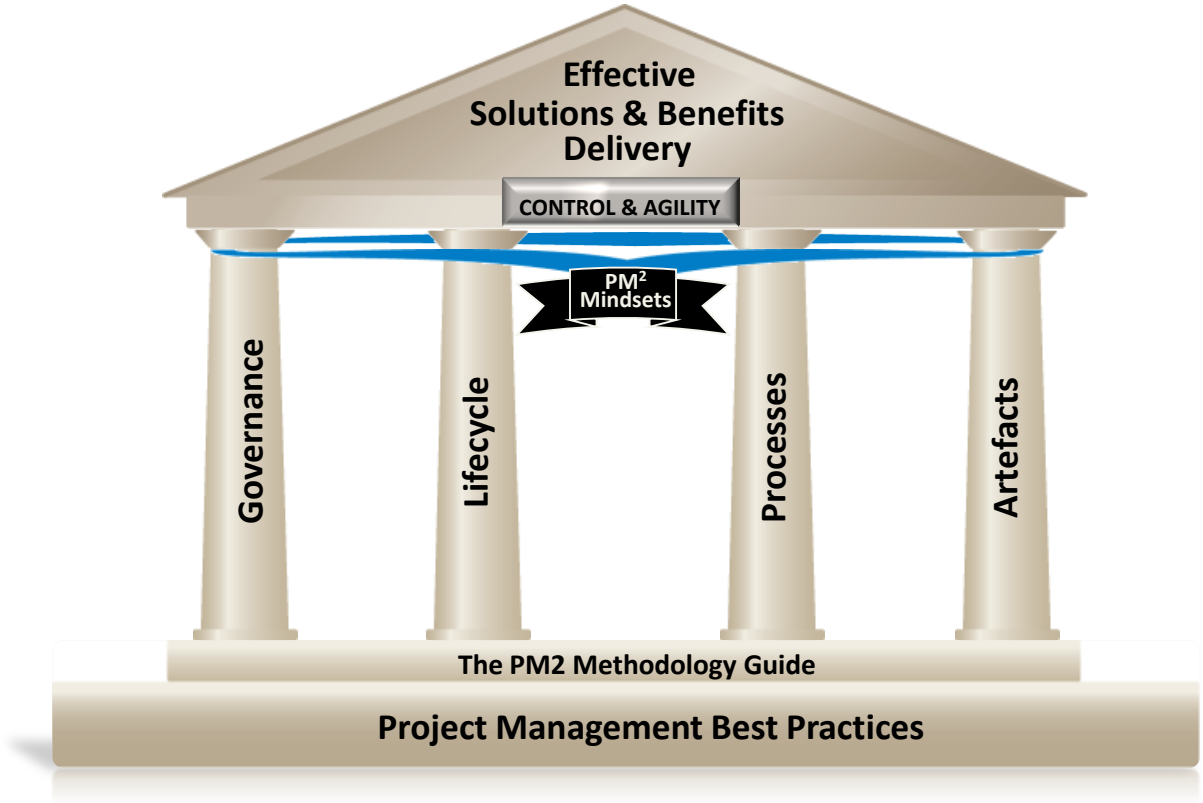
- Project deliverables are merely a means to an end.
- The real purpose of a project is to achieve certain outcomes.

Note that project outcomes and benefits are often realized only after the project has closed (!?)

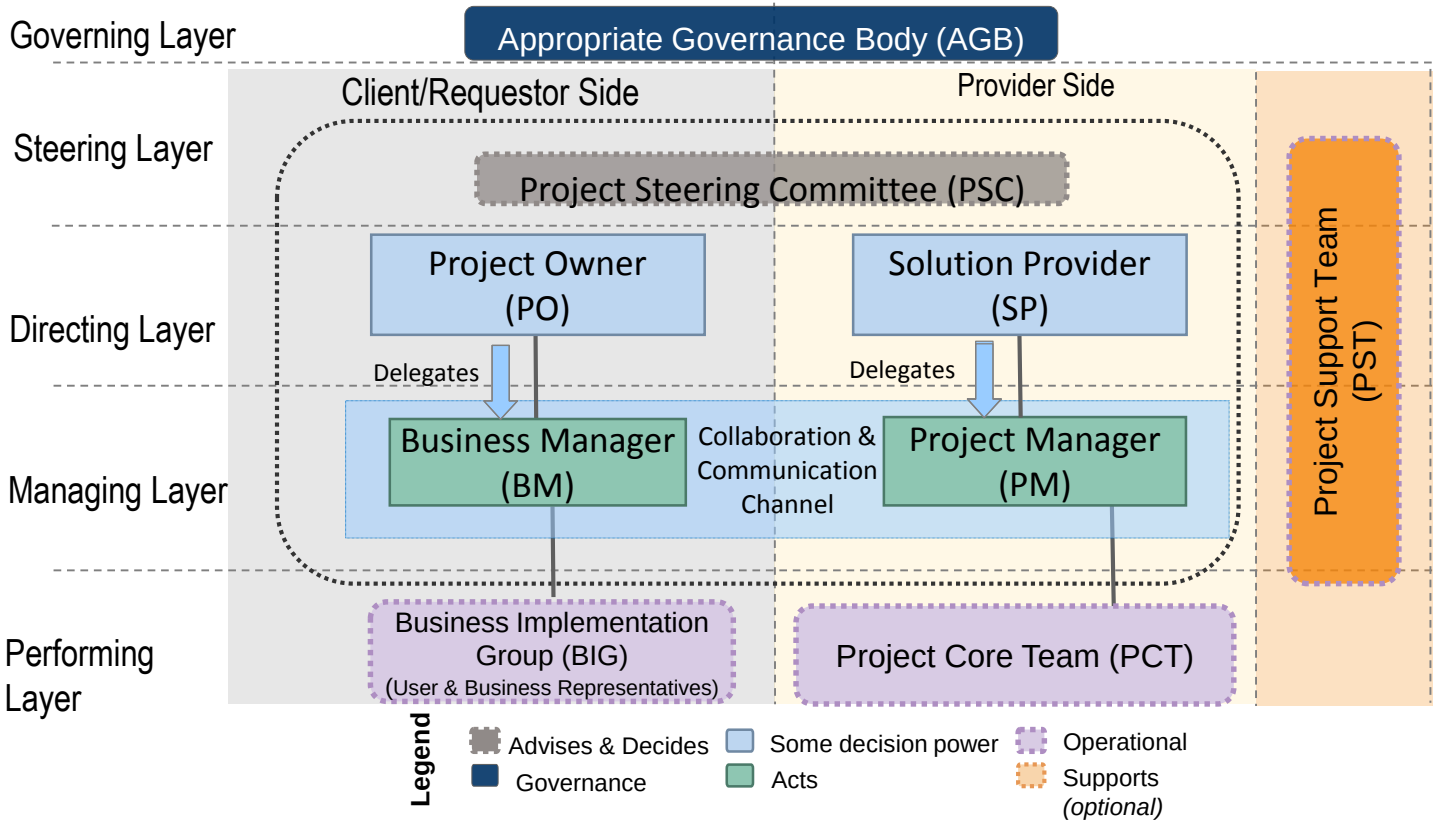
Portfolio, Programme, Project Relationship



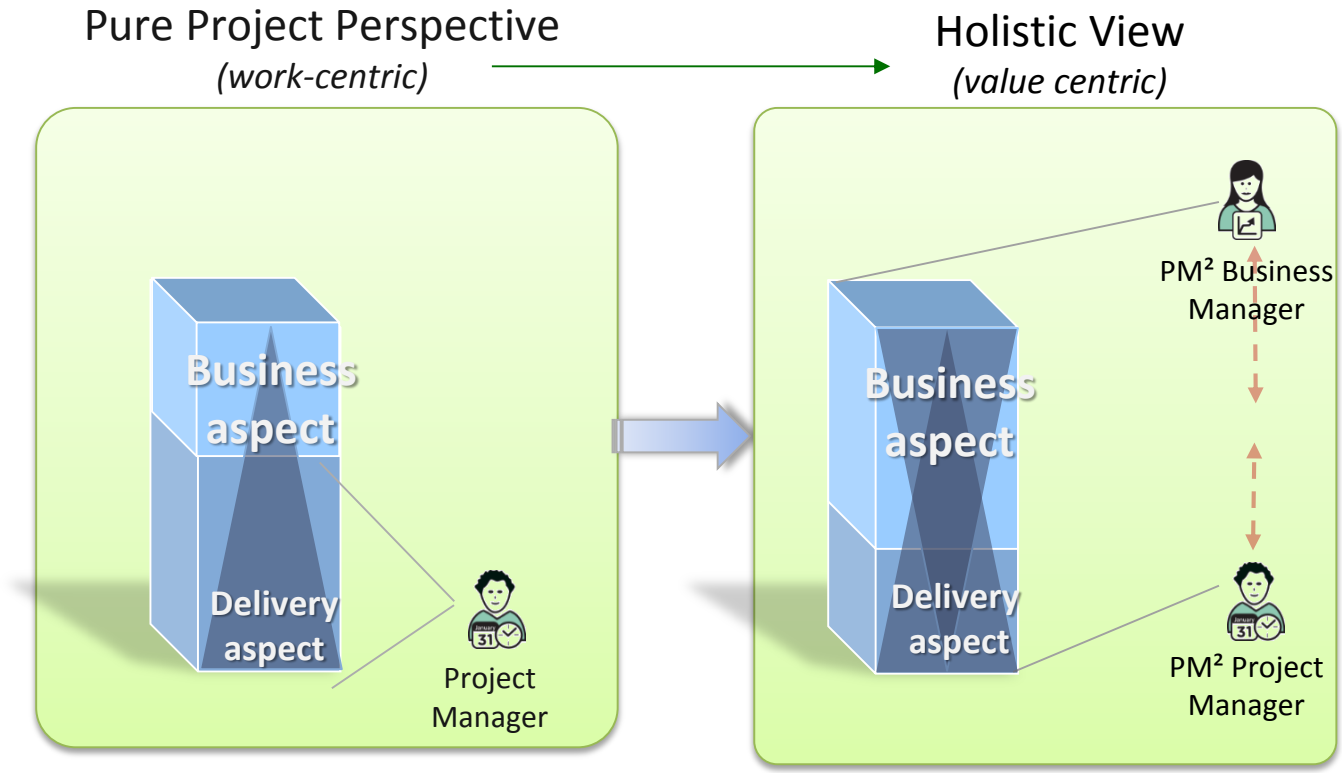
The House of PM²



The PM² Governance Model



A Shift in Perspective



PM² Artefacts & Activities Overview: RAM (RASCI)

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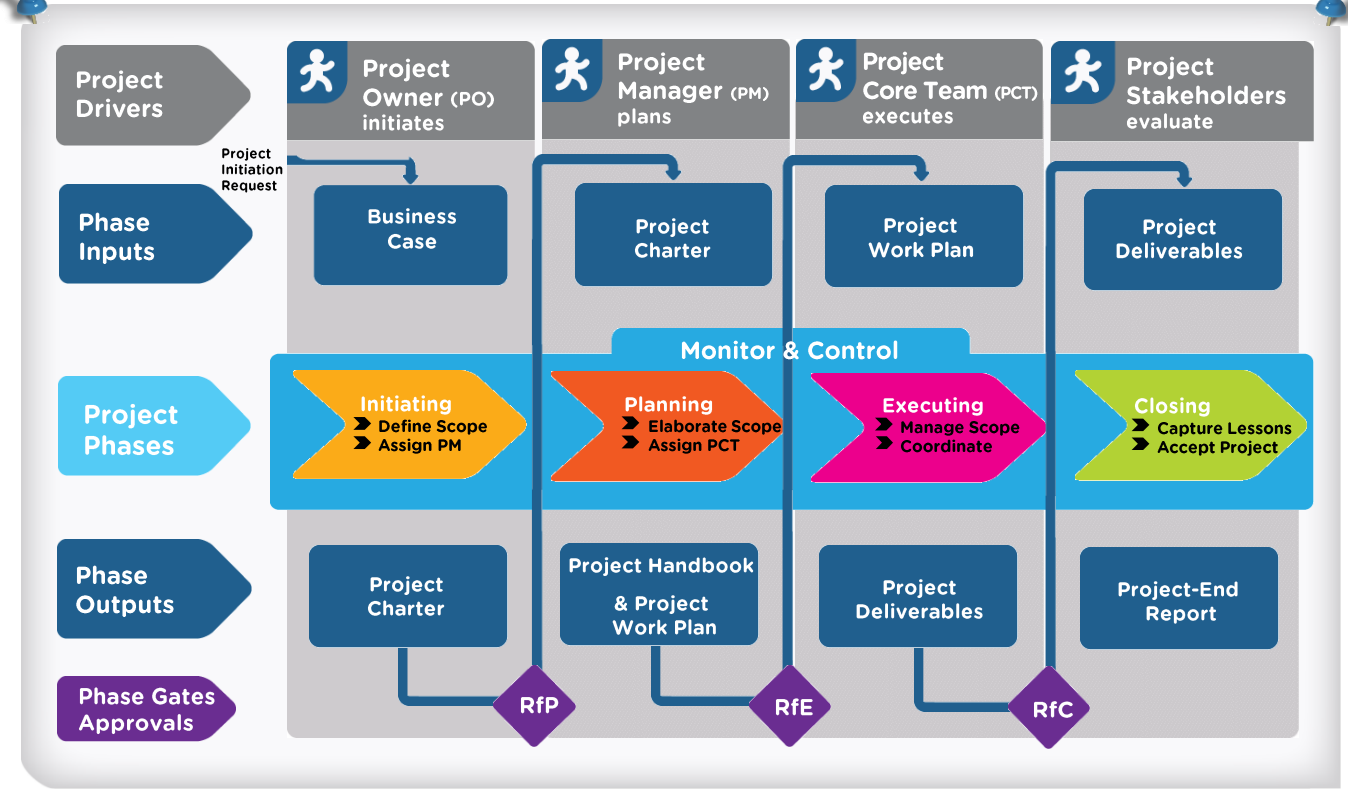
Initiating	AGB	PSC	PO	BM	UR	SP	PM	PCT
Project Initiation Request	I	NA	A/S	R	S/C	I	N/A	N/A
Business Case	I	C	A	R	C	S	S	N/A
Project Charter	I	C	A	S	C	S	R	C
Planning	**AGB**	**PSC**	**PO**	**BM**	**UR**	**SP**	**PM**	**PCT**
Planning Kick-off Meeting	I	A	C	S	C	C	R	C
Project Handbook	I	I	A	S	C	I	R	C
Project Stakeholder Matrix	I	I	A	S	C	I	R	C
Project Work Plan	I	A	C	S/C	C	C	R	S/C
Resource Plan	I	I	A	S	C	I	R	C
Business Implementation Plan	I	I	A	R	C	I	S	I
Transition Plan	I	A	C	C	C	C	R	C
Outsourcing Plan	A	C	C	C	I	S	R	I
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
Communications Management Plan	I	I	A	S	C	I	R	C
Quality Management Plan	I	A	C	C	C	C	R	C
Deliverables Acceptance Plan	I	A	C	S	I	C	R	C
Executing	**AGB**	**PSC**	**PO**	**BM**	**UR**	**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**	**UR**	**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 Quality	I	I	I	S/C	C	A	R	C
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 Stakeholders	I	I	A	C	I	C	R	I
Manage Deliverables Acceptance	I	I	A	S	C	C	R	C
Manage Transition	I	A	C	C	C	C	R	C
Manage Business Implementation	I	I	A	R	C	I	S	I
Manage Outsourcing	A	C	C	C	I	S	R	I
Closing	**AGB**	**PSC**	**PO**	**BM**	**UR**	**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

RASCI:

- **R**esponsible,
- **A**ccountable,
- **C**onsulted,
- **S**upports,
- **I**nformed.

AGB (Appropriate Governance Body)
PSC (Project Steering Committee)
PO (Project Owner)
BM (Business Manager)
SP (Solution Provider)
PM (Project Manager)
PCT (Project Core team)

The Phase PM² Methodology Phases & Drivers

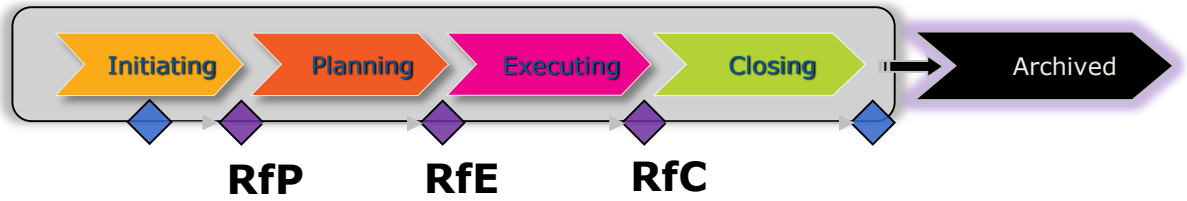


Phase Gates / Approvals

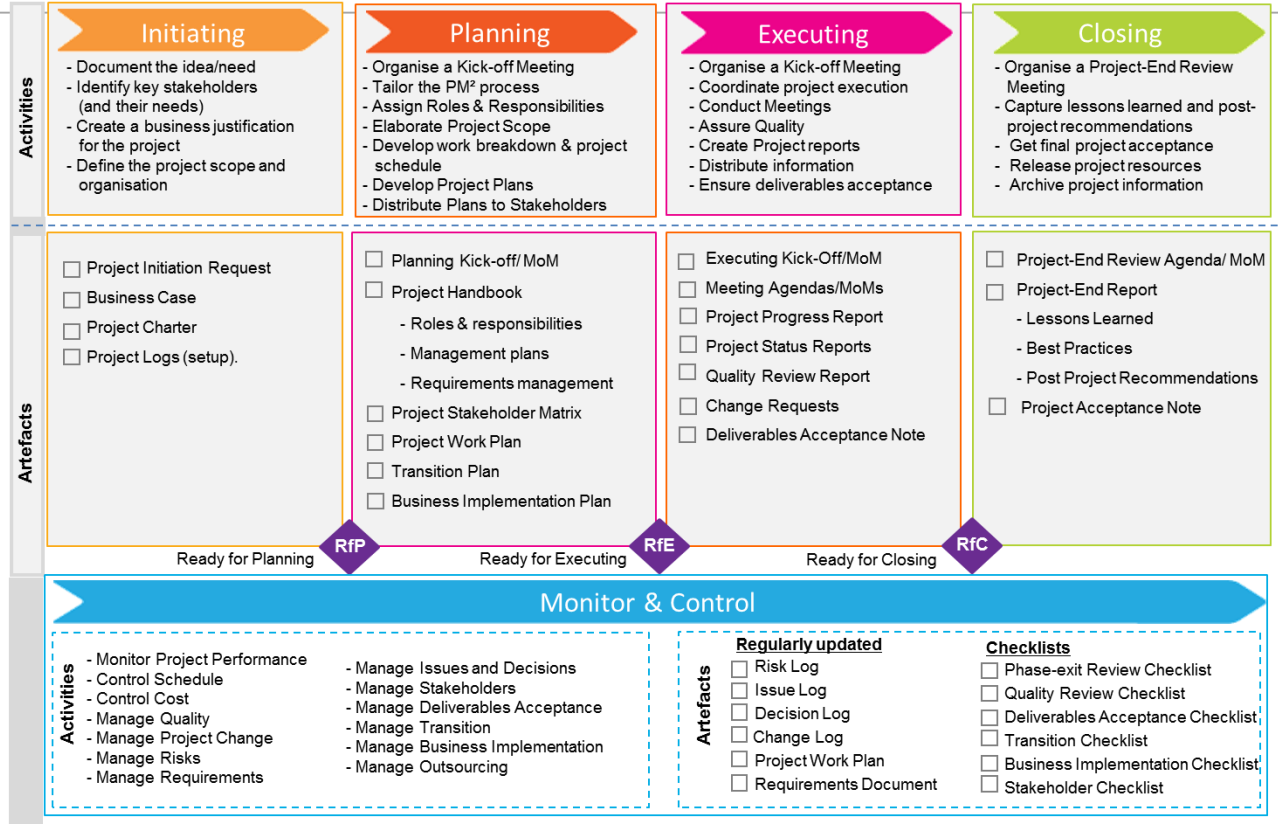
These check points contribute to the overall project management quality.

The three PM² (approval) Phase Gates are:

- RfP (Ready for Planning): At the end of the Initiating Phase
- RfE (Ready for Execution): At the end of the Planning Phase
- RfC (Ready for Closing): At the end of the Executing Phase



The PM² Phases and Artefacts



The PM² Guide

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Initiating Phase
- Initiating Kick-off Meeting
- Project Initiation Request
- Business Case Project Charter

Planning Phase
- Planning Kick-off Meeting
- Project Handbook
- Project Work Plan
- Project Stakeholder Matrix
- 6 Project Management Plans

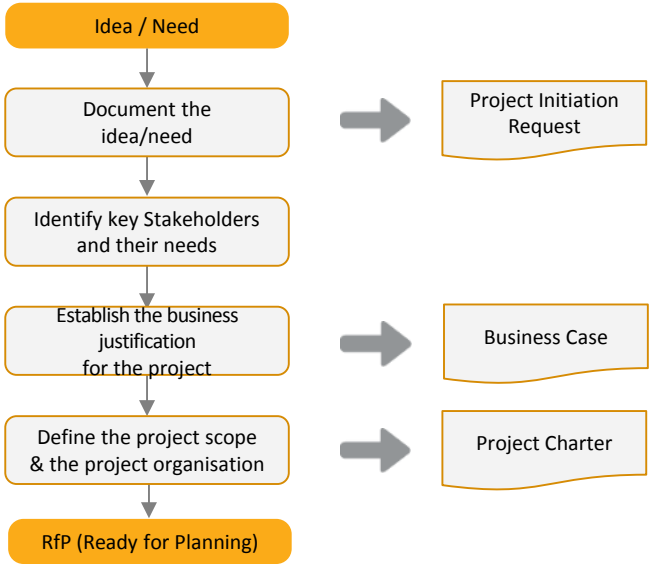
Executing Phase
- Executing Kick-off Meeting
- Project Coordination
- Quality Assurance
- Project Reporting
- Information Distribution

Monitor & Control
- 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

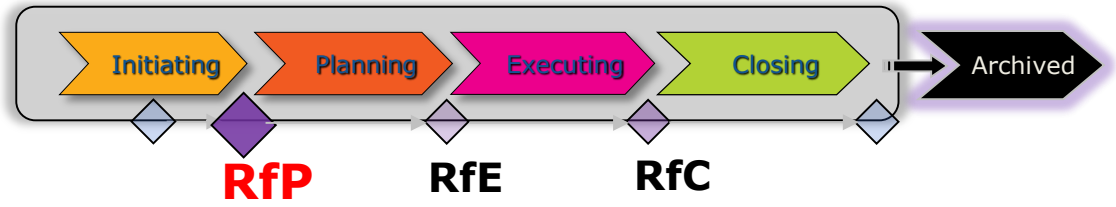
Closing Phase
- Project-End Review Meeting
- Project-End Report
- Administrative Closure

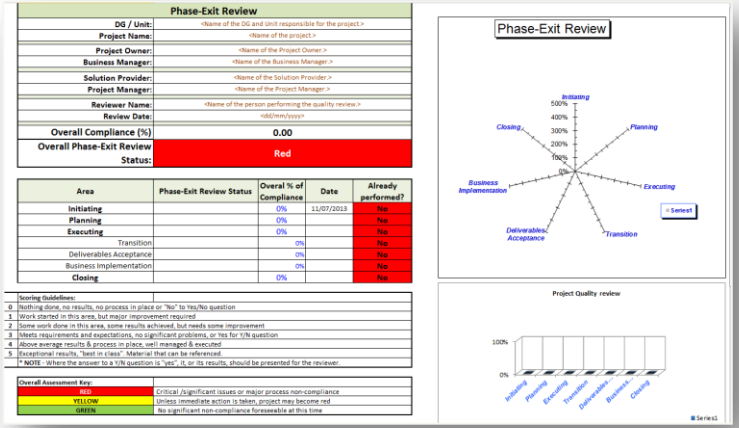
What happens in the Initiating Phase

- The objectives of the project are defined
- Some preliminary planning is performed
- The necessary documentation is produced
- Approvals to continue with the activities of the next phase is requested,



RfP (Ready for Planning)?





Phase-Exit Review

DG / Unit:	<Name of the DG and Unit responsible for the project.>
Project Name:	<Name of the project.>
Project Owner:	<Name of the Project Owner.>
Business Manager:	<Name of the Business Manager.>
Solution Provider:	<Name of the Solution Provider.>
Project Manager:	<Name of the Project Manager.>
Reviewer Name:	<Name of the person performing the quality review.>
Review Date:	<dd/mm/yyyy>
Overall Compliance (%)	0.00
Overall Phase-Exit Review Status:	Red

Area	Phase-Exit Review Status	Overal % of Compliance	Date	Already performed?
Initiating		0%	11/07/2013	No
Planning		0%		No
Executing		0%		No
Transition		0%		No
Deliverables Acceptance		0%		No
Business Implementation		0%		No
Closing		0%		No

Scoring Guidelines:	
0	Nothing done, no results, no process in place or "No" to Yes/No question
1	Work started in this area, but major improvement required
2	Some work done in this area, some results achieved, but needs some improvement
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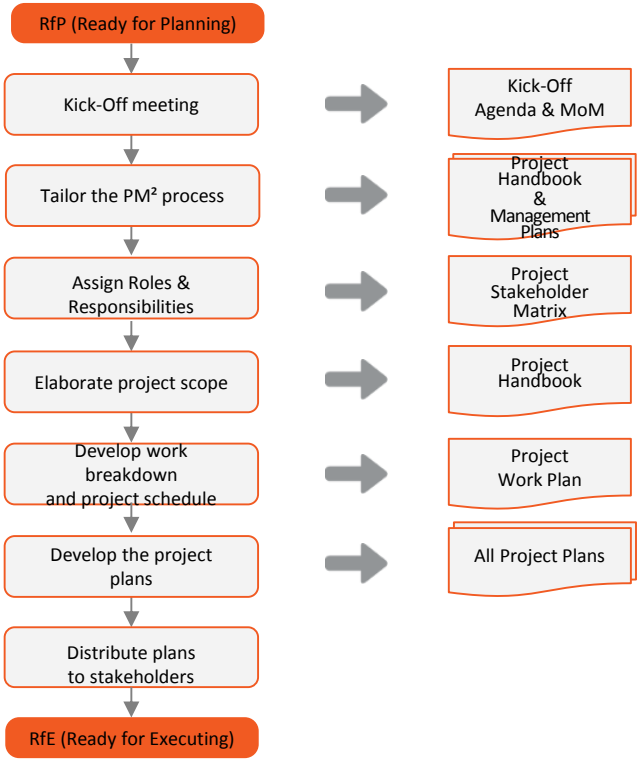
Overall Assessment Key:	
RED	Critical /significant issues or major process non-compliance
YELLOW	Unless immediate action is taken, project may become red
GREEN	No significant non-compliance foreseeable at this time

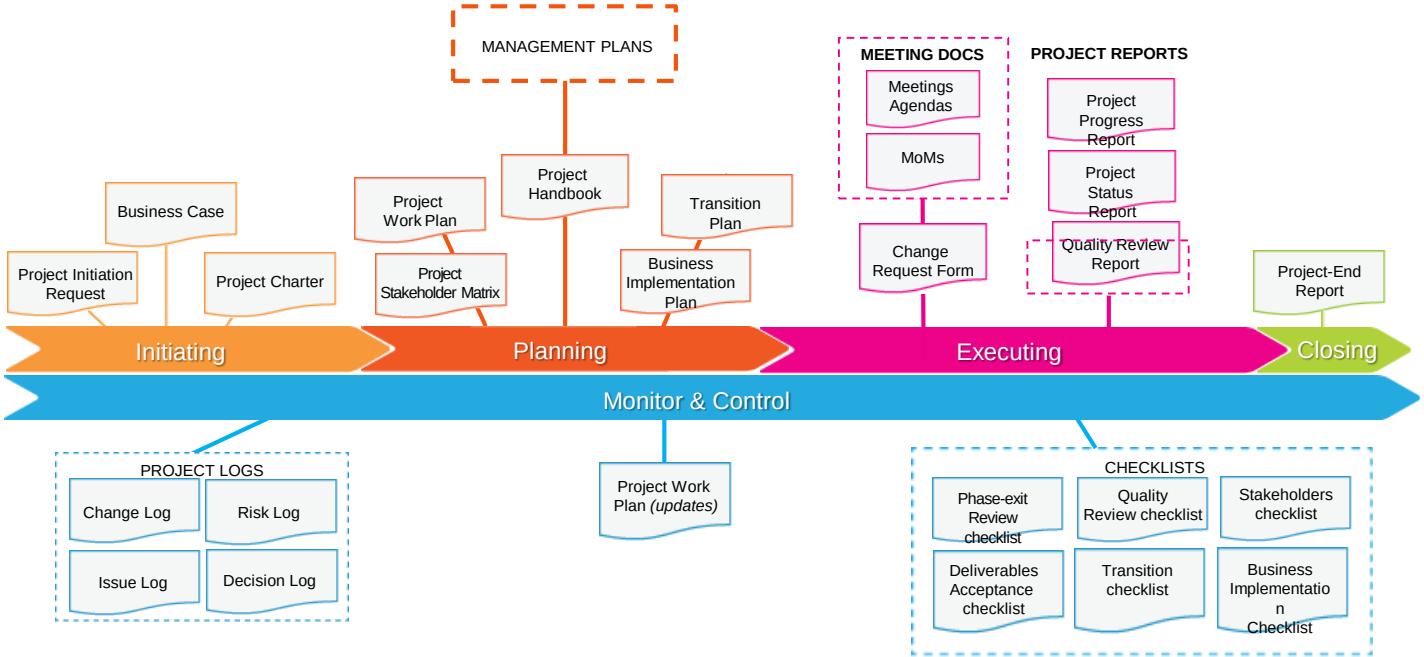
What happens in the Planning Phase

During the Planning Phase, the objective of the project is verified and developed into a workable plan for implementation. This involves the following:

- Develop the project scope statement and 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.



The PM² Artefacts Landscape



Planning: Project Handbook

The Project Handbook should be kept up-to-date throughout the life of the project. During the Closing Phase, the Project Handbook becomes an important input to the Project-End Review Meeting, and should be subsequently properly closed and archived.

- 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** *(management products)***.**
- The Project Handbook becomes the basis for managing the project throughout its lifecycle and is an **important point of reference** for all project members.

Planning: Transition Plan

The Transition Plan defines 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.

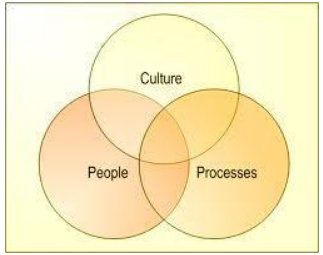
Steps:

1. Identify the roles and responsibilities of all aspects of the transition process.
2. Document the prerequisites of what must be completed before transition can start.
3. Define what must be achieved in order for the transition to be concluded.
4. Develop a schedule for all transition activities.
5. Determine any backups needed prior to the start of any transitioning activities.
6. Define what needs to be prepared in the environment (e.g. necessary testing etc.).
7. Analyse any system and data conversion impact.
8. Determine any coordination need between teams.
9. Define any transfer of responsibility for the deliverables from the Project Core Team (PCT) to the Project Owner (PO) and support staff.
10. Ensure that maintenance support is foreseen.
11. Define that business interruptions are formally approved by the Project Owner (PO).
12. Ensure that business interruptions are communicated in a timely fashion.
13. Ensure that a formal announcement of the transition is planned.

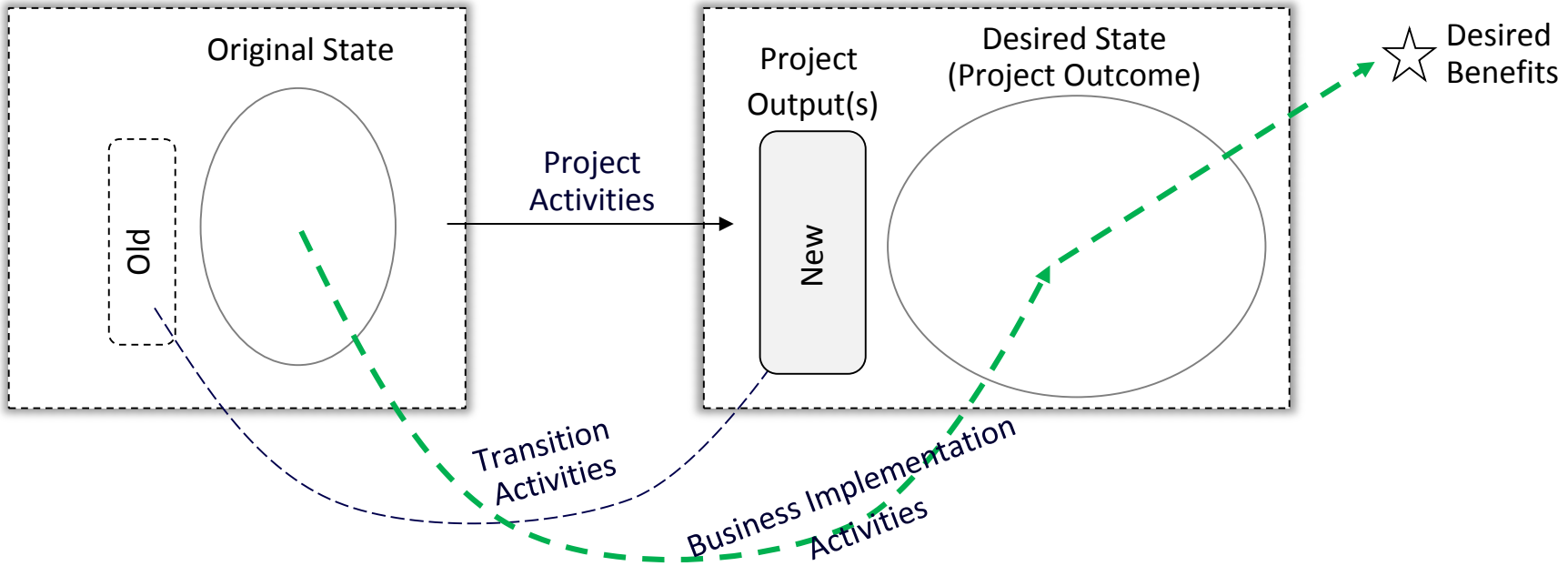
Business Implementation Plan

The Business Implementation Plan outlines the impact of the project on the organisation along with the change management activities that need to take place.

- The organisation must assure that the project outputs are **effectively integrated** into the organization.
- **The business implementation activities become part of the Project Work Plan and are scheduled and controlled as part of the overall project.**
- Business implementation activities will almost always be required long after the project has concluded, so it's a good practice to also define some post-project change activities.



Transition vs Business Implementation



Example Scenario:

A paper based process (Old) is replaced by an Information System (New).

The reason: Inefficiencies, errors, etc. (Original State).

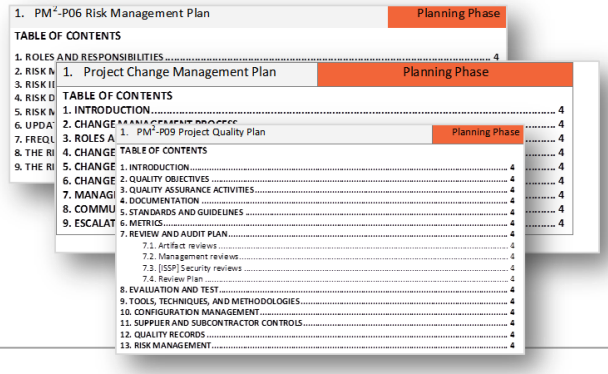
The result: Efficiency, traceability, real time reporting capabilities (Desired State (Project Outcome)).

The benefit: 10% cost reduction (☆ Desired Benefits).

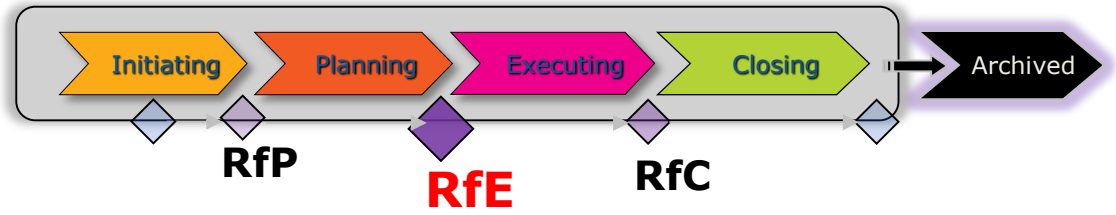
Planning: The PM² Management Plans

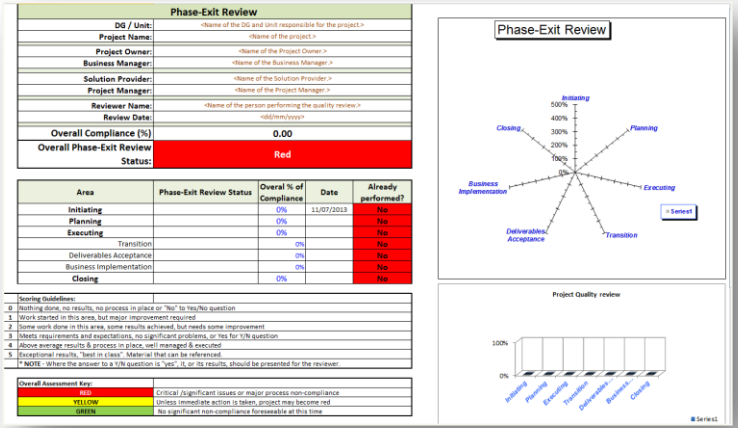
1. Risk Management Plan
2. Requirements Management Plan
3. Project Change Management Plan
4. Issue Management Plan
5. Quality Management Plan
6. Communications Management Plan

Can be standalone **OR** can be part of the Project Handbook



RfE (Ready for Executing)?





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Project Manager:	<Name of the Project Manager.>
Reviewer Name:	<Name of the person performing the quality review.>
Review Date:	<dd/mm/yyyy>
Overall Compliance (%)	0.00
Overall Phase-Exit Review Status:	Red

Area	Phase-Exit Review Status	Overal % of Compliance	Date	Already performed?
Initiating		0%	11/07/2013	No
Planning		0%		No
Executing		0%		No
Transition		0%		No
Deliverables Acceptance		0%		No
Business Implementation		0%		No
Closing		0%		No

Scoring Guidelines:	
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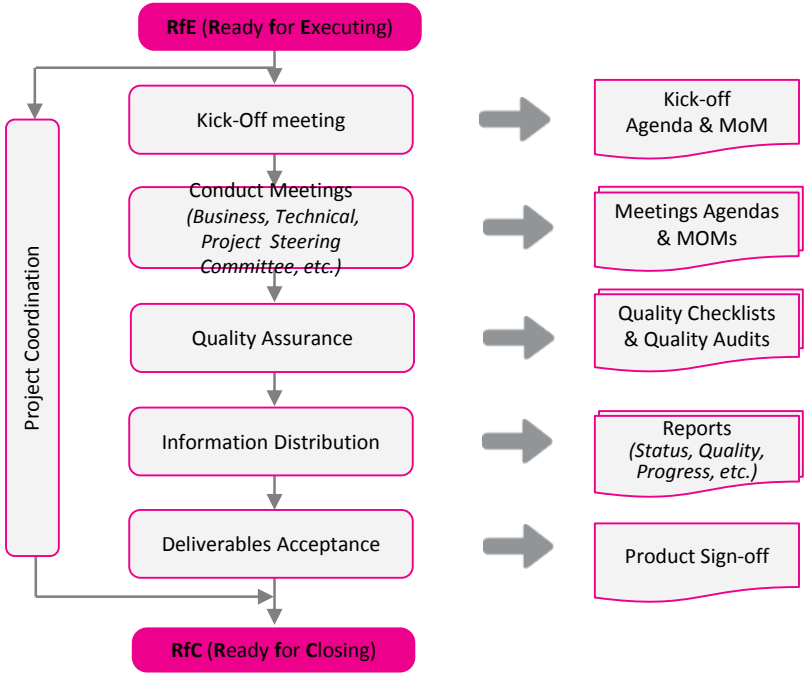
RED	Critical /significant issues or major process non-compliance
YELLOW	Unless immediate action is taken, project may become red
GREEN	No significant non-compliance foreseeable at this time

What happens in the Executing Phase

During the Executing Phase the project activities are carried out as defined in the project plans. This involves the following:

- Coordinating project work (e.g. assigning work to team members or resolving issues).
- Coordinating people and resources, as well as integrating and performing the activities of the project in accordance with the project plans.
- Reporting on the project progress (compared to the planned progress).
- Producing the project deliverables.



Executing: Project Coordination

The objectives of project coordination are to ensure the project's progress, continuously ensure the adequate provision of information to Project Core Team (PCT) and other project contributors, as well as to continuously support the completion of assigned work.

Guidelines:

- In reality, project coordination begins with the initiation of the project and ends with the closing of the project; however, the intensity of project coordination peeks during the Executing Phase.
- Project coordination includes:
  - the allocation of project resources to activities,
  - performing continuous quality checks of the interim results of work,
  - on-going communication with the Project Core Team (PCT), Project Steering Committee etc.

Executing: Project Reporting

The purpose of all Project Reports is to document and summarize the status of various dimensions of the project progress for the purpose of communicating it with relevant project Stakeholders. Project Reports typically provide information on scope, schedule, cost, and quality, but often also include relevant information on risks, issues, project changes and contract management issues.

Guidelines:

Project Reports become an important input for project controlling and decision making during the project. They are also an input to the Project-End Review and an important means of capturing historical information, and therefore, should be properly archived during the closing phase.

Project Reports should be tailored to every project's needs as they should serve the information and communication needs of the projects.

The following are examples of PM² reports:

- The Project Status Report.
- The Project Progress Report.
- The Quality Review Report.
- Contractor Status Report.
- Custom or Ad-Hoc Reports.

Executing: Information Distribution

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

Guidelines:

- Relevant information, resulting from the executing of the project plans, is communicated to (a) appropriate parties at (b) the right time and in (c) the appropriate format.
- When meetings are used for information distribution, arrange the frequency of meetings taking into account the timetable for the project and the need for regular communication of information.
- Ensure alignment of stakeholders by communicating Status and Progress Reports on how the project is evolving in comparison to its baseline schedule and budget.

Steps:

1. Execute the Communications Management Plan .
2. Distribute Project Performance Reports
3. Communicate updates of the Project Work Plan.

Executing: Quality Management

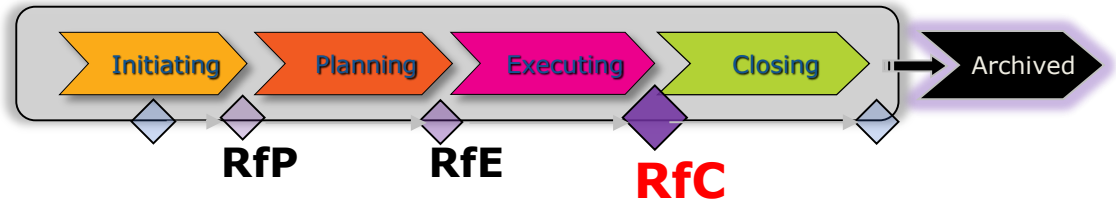
The purpose of quality management is to ensure that both the project management process and project deliverables will **meet** predefined quality expectations in the most efficient way. It involves overseeing all activities needed to devise and implement quality planning, quality assurance, quality control and quality improvement up till the point of the final project acceptance (Closing Phase).

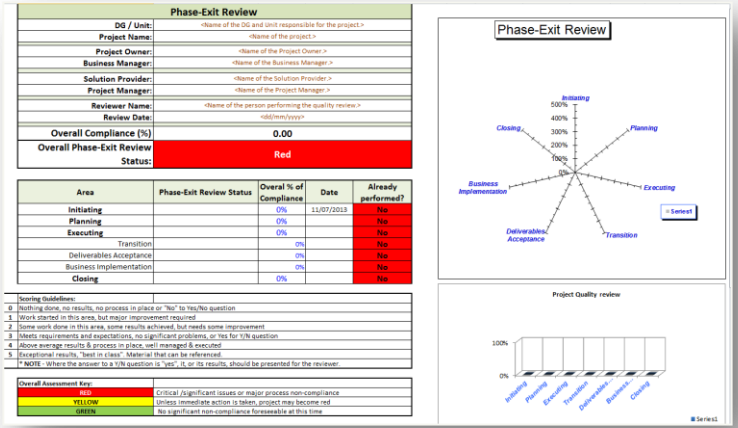
The Project Manager (PM) must ensure that the objectives, approach, requirements, activities and responsibilities of the project's quality management process are clearly defined and documented in the Quality Management Plan.

Steps

1. Define, agree and achieve the project quality characteristics considering project needs, constraints, and cost/benefits analysis.
2. Plan and perform quality assurance and control activities.
3. Achieve the active involvement of the whole project team and relevant stakeholders.
4. Identify any non-conformity, analyze the root cause and implement corrective actions.
5. Identify opportunities for quality improvements in both the process and the deliverables.
6. Ensure that all deliverables are accepted by the relevant stakeholders based on a pre-defined quality/acceptance criteria and the agreed acceptance process.

RfC (Ready for Closing)?





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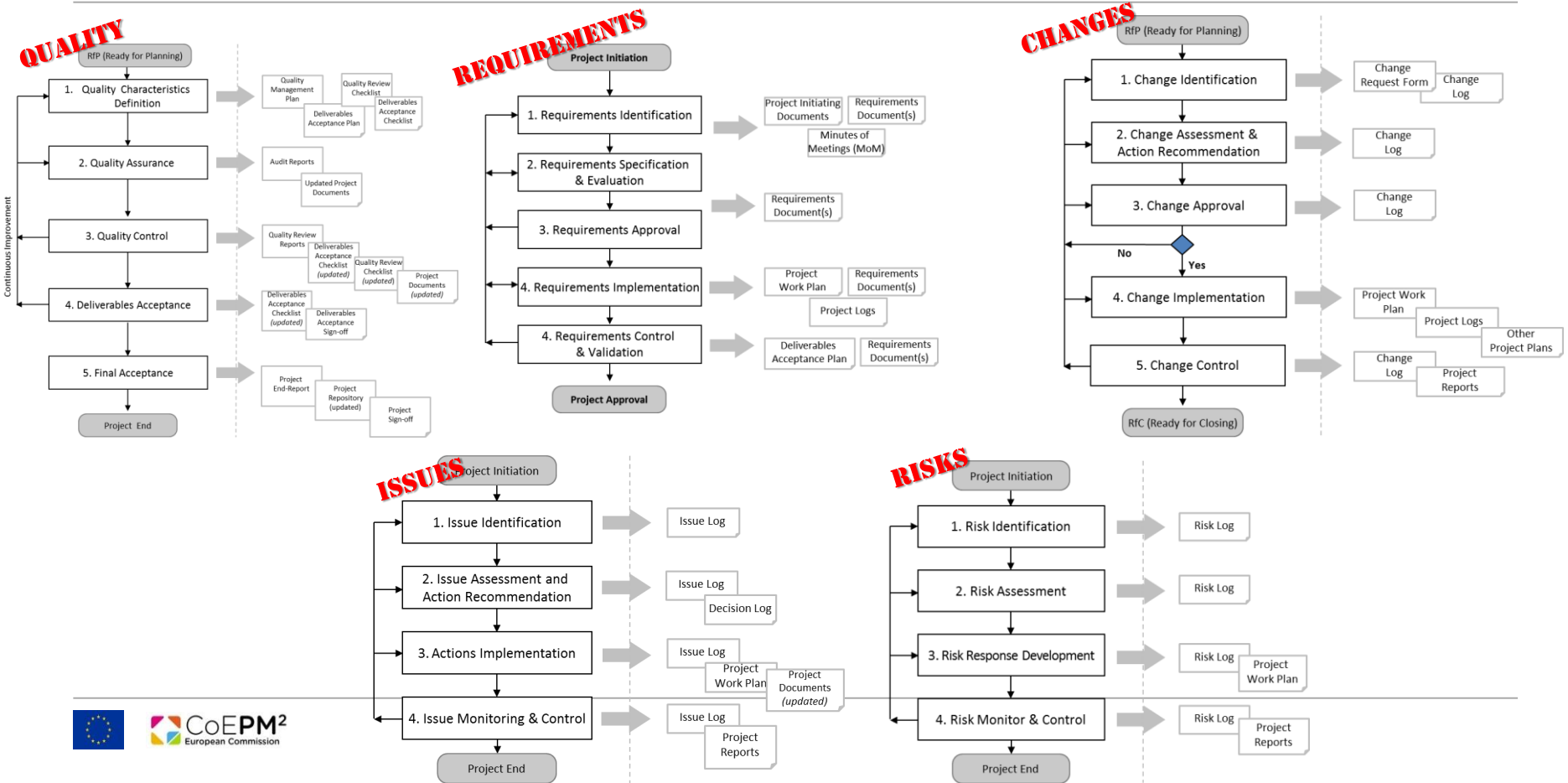
Monitor & Control Activities

- 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

Management Processes



Monitor Project Performance

The objective of monitoring the project performance is to be in a position to know whether the project is advancing satisfactorily. The Project Manager (PM) tracks project variables (i.e. cost, schedule, scope and quality), monitor's risks, project change and overall project performance, and should be in a position to report and forecast project evolution to the project Stakeholders.

This information is then made available (distributed) to the necessary stakeholders as defined in the Communications Management Plan.

Steps

1. Use the baselined Project Work Plan as a reference for monitoring. The critical path and related issues is a subject of particular attention.
2. The Project Core Team (PCT) exchanges information regularly with the Project Manager (PM) about current status and next steps of the project through formal and informal meetings.
3. The Project Manager (PM) gathers information and monitors progress on:
    - **Tasks**
    - **Key outputs**
    - **Resource utilisation/consumption**
    - **Status of key logs**

Manage Stakeholders

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).

Stakeholders can be directly involved in a project's work, or can be members of other internal organizations, or even be external to the performing organization (e.g. suppliers, users, EU citizens).

Guidelines:

- Depending on the complexity and scope of a project there may be few or a large number of stakeholders.
- The more people the project impacts, the more likely it is that various conflicts will arise.
- The effective management and involvement of project stakeholders becomes a very important task for project success.

Manage Deliverables Acceptance

A project may produce one or more deliverables. Each of these deliverables must be formally accepted. The deliverables acceptance control ensures that these deliverables meet the predefined objectives and set of criteria defined in the Deliverables Acceptance Plan so that the project requestor can formally accept them.

Steps

1. Project Manager (PM) ensures:
   - The application of the acceptance procedures and guidelines for performing the acceptance.
   - The provision of the necessary environments, materials and information.
2. The Project Steering Committee (PSC) **approves** the application of the documented acceptance strategy as well as the acceptance schedule.
3. The project deliverables are accepted if the acceptance activities (as described in the Deliverables Acceptance Plan) are successfully performed and within pre-specified tolerances.
4. The project deliverables may be conditionally accepted even with a set of known defects or issues, provided that these are documented and that there is plan for addressing them.
5. The Business Manager (BM) provides business knowledgeable resources to perform the user-acceptance.
6. The Project Manager (PM) ensures that in addition to the main deliverables, that any supporting deliverables (such as documentation) are also supplied (e.g. in the case of an Information System such deliverables can include the End-User Support Material, User's Manual, Operations Manual, Training Materials including, Release Notes, etc.)
7. The Project Owner (PO) formally accepts the project's deliverables.

Manage Outsourcing

The Project Manager (PM) liaises with the Contractor's Project Manager (CPM) to ensure the Contractor delivers acceptable quality of work as defined in the Outsourcing Plan.
Note that the EC procurement process supersedes this guideline.

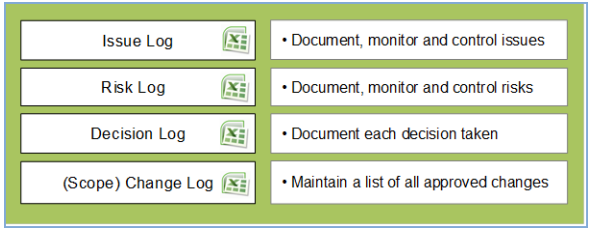
Steps:

1. The Project Manager (PM) monitors that the Outsourcing Plan details the way of working for the specific project is applied.
2. The Project Steering Committee (PSC) ensures that the contractor is chosen according to the EC Standards and to the criteria defined for the project.
3. They also ensure contracts define the expectations for both parties.
4. The Project Manager (PM) and/or Project Steering Committee (PSC) validate interim and final deliverables and/or milestones according to criteria agreed and as defined in the Outsourcing Plan.
5. The Project Manager (PM) ensures that the required formal sign-offs are done in a timely manner and to EC standards.
6. The Project Manager (PM) monitors costs and schedules.
7. The Contractor's Project Manager (CPM) reports the project status and progress to the Project Manager (PM) and to the Project Steering Committee (PSC) if necessary.

Summary – Monitor & Control

Monitor & Control your project

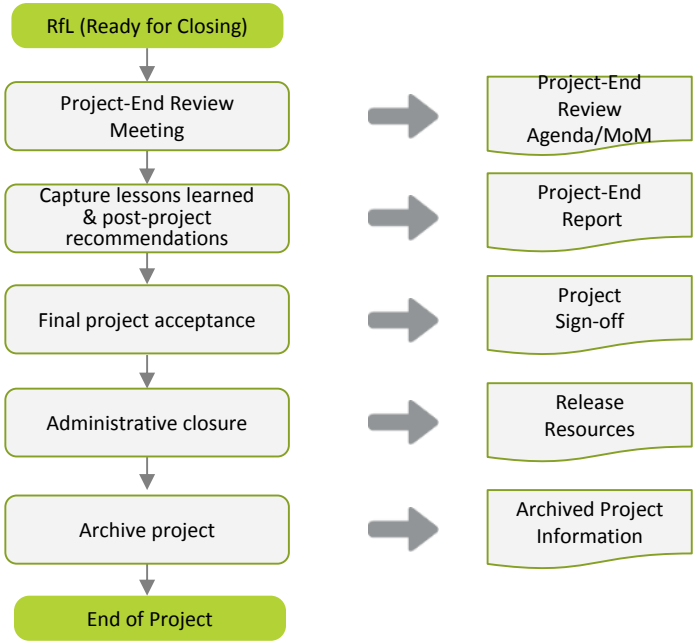
- Monitor & Control your risks / issues
  - Issue log
  - Risk log
- Log the decisions taken (Decision Log)
- Monitor & Control your scope
  - Try to avoid scope creep except if extra budget and time
  - Change log
- Monitor & Control your schedule & cost (Work Plan)
  - Planned Vs Actual



What happens in the Closing Phase

During the Closing Phase, the project's activities are 100% completed, the project's final state is documented, and the finished deliverables are officially transferred to the custody, and control of the Project Owner (PO). This involves the following:

- Finalises all activities across all of the deliverables to formally close the project.
- Meets to discuss the project's performance, problems faced during the Executing Phase and Best Practices and Lessons Learned.
- The Lessons Learned and Best Practices are captured in the Project-End Report and added to a knowledge database for future reference.



Project-End Review Meeting

The Project-End Review Meeting launches the Closing Phase of the project after the final project deliverable(s) have been transferred to the care, custody, and control of the Project Owner (PO) and the Executing Phase has been deemed as completed.

The goal of this meeting is to ensure that that Project Members discuss the project experience so that Lessons Learned and Best Practices are captured. In addition, ideas and recommendations for post-project work should also be discussed.

Project-End Report

Following the Project-End Review Meeting, the project experience is summarised in a report. Best practices, lessons learned, pitfalls and solutions to particular problems are documented in this report and they should be used as a knowledge base for future projects. This document should be part of a central knowledge database describing project experiences with best practices and common pitfalls.

Topics to Discuss:

1. Project effectiveness.
2. Cost, Schedule, Scope, and Quality Management.
3. Risk Management.
4. Issue Management.
5. Project Change Management.
6. Communication Management.
7. Human resources and stakeholder management.
8. Acceptance Management.
9. Business Implementation Management and Project Transition.
10. Performance of the Performing/Participating Organisation.
11. Performance of the Project Core Team (PCT).
12. Applied working methods, process and procedures.

Lessons Learned and Post-Project Recommendations

Allow projects/project teams as well as the permanent organization as a whole to benefit from important lessons that the projects have acquired, and capture ideas and recommendations for post-project work related to the product/service operations, extensions, maintenance, ideas for follow-up projects, etc.

Note that as improvement opportunities or post-project recommendations are identified throughout the project, they should be captured in some form (e.g. lessons learned log), because, particularly for longer projects, these ideas may get lost by the time the project reaches the Closing Phase.

There are many benefits of formalizing Lessons Learned and Post-Project Recommendations. For example, project team members share their perspective and provide feedback and useful insights which provide the requestor side with useful information as they move into the post-project mode.

Lessons Learned and Post-Project Recommendations

Due to the individual nature of projects, the Lessons Learned process cannot be a generic process, however, there are common aspects of projects which can be discussed: project definition and planning (scope, deliverables, resources, etc.), project communications, project documentation, change control, risk/issue management, decision making, successes, mistakes and failures, team dynamics, overall project performance.

Some advice:

1. The **Lessons Learned session should be performed as part of the Project-End Review Meeting**, (and optionally at the end of major milestones or project phases).
2. It may be better to have someone that hasn't been intimately involved in the project coordinating the Lessons Learned so that the Project Manager can contribute as a participant.
3. Coordinate the discussion through the various aspects of the project in a somewhat organized manner in order to cover all aspects of the project. This could be based on project phases, categories of activities, etc.
4. Organizing improvement ideas into groups to help the team better visualize the appropriate next steps required to actually implement improvement ideas.
5. In some cases it makes sense to break the Lessons Learned into multiple sessions to focus on specific topics (e.g., technical issues, Business Implementation, etc.).
6. Lessons Learned session should **not** be too long as they may lose energy and focus. If necessary, the Lessons Learned sessions can be broken down into more than one thematic sessions of appropriate length.

The PM² Mindsets

Why Mindsets? Because they:

1. help us navigate through the complexities of project reality
2. help us reposition our perspective and enhance our view of the project goals within a wider project and organizational context
3. are useful reminders of effective attitudes & behaviours
4. remind us what is important for project management success
5. become the glue that holds together the PM² processes and practices
6. provide a common set of beliefs and values for all PM² practitioners

Altogether, the Mindsets offer PM² a "personality" with which PM² Project Managers can associate with and reinforce our sense of community:

PM² is **OUR** methodology.

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: 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.

PM² Mindsets: IAQs (Questions for the Brave!) (cont'd)

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… 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

The Methodology's processes, artefacts, tools and techniques, help us mange the project dimensions of
time, cost, scope and quality,
whereas
the Mindsets present those attitudes and behaviours which help us focus on what is really important in achieving our project/management goals.
Together
they help us navigate through the complexities of managing PM² projects and make PM² more effective and complete.


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