



# Programme Management Methodology v2

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# What is PM<sup>2</sup>-PgM?

The purpose of PM<sup>2</sup>-PgM is to enable Organisations and teams to deliver solutions and benefits to their stakeholders through the effective management of initiatives which have been initiated as programmes.

The application of a Programme Management Methodology within an organisation formalises its Programme Orientation. It helps to define the governance, management activities, documentation artefacts, required to:

- establish a link between the organisation's strategy and programme and project objectives.
- set-up effective programme governance teams.
- initiate, plan, execute, monitor & control programmes.
- define well-coordinated projects that deliver their outputs in a timely fashion and realise the intended outcomes & benefits.
- manage cross-project dependencies or issues and effectively manage changes and risks.
- properly close the programme and its project components.

## What is a Programme?

A Programme is temporary flexible structure which consist of a number of interrelated projects and other work (i.e. the programme components) which are grouped together (either after being initiated because of the programme, or after being made part of the programme), and whose delivery facilitate the realisation of the programme goals and intended benefits.

PM<sup>2</sup>-PgM presents an effective standalone programme management methodology. The PM<sup>2</sup>-PgM Guide encapsulates globally accepted best practices from other methods and standards form PMI, AXELOS, IPMA, and the European Union Institutions, as well as the contributions of experts and practitioners.

The strategy chosen is to provide programme management guidelines that are lean, user-centric and that effectively describe the PM<sup>2</sup>-PgM Model to a broad and varied audience. It provides a management Model which is compatible with the way projects and programmes can be managed within the majority of Organisations (i.e. Matrix and Functional Organisations).

### Portfolios

components grouped together for better strategic and inancial control and reporting

### Programmes

interdependent components towards common outcomes

### Projects

interdependent activities towards common outputs

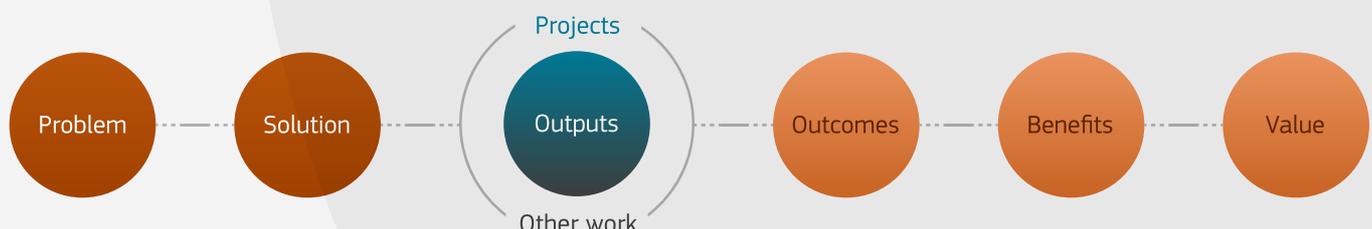
### Work Packages

related activites

Other Work

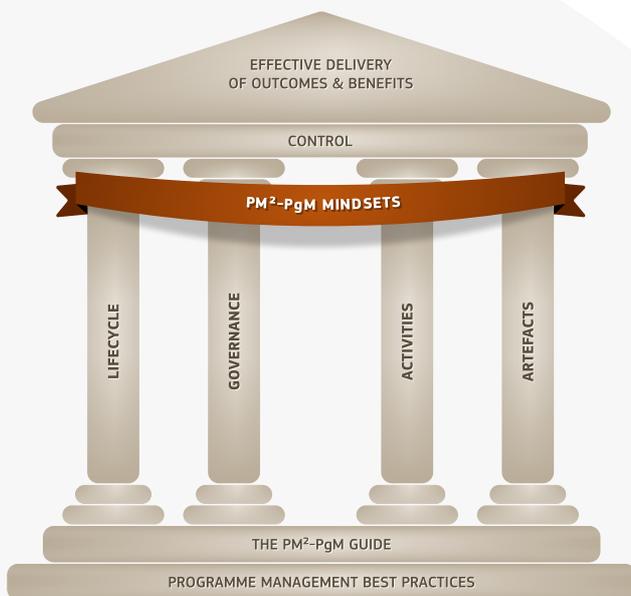
## From Problem to Value

Programmes are temporary, flexible structures composed of interrelated projects and other work, designed to deliver coordinated outputs that lead to outcomes, benefits, and lasting value.



# PM<sup>2</sup>-PgM Pillars

PM<sup>2</sup>-PgM programme management is open, effective, and lean. It incorporates elements from a wide range of globally accepted programme management best practices and operational experience from EU Institutions.



- I a **governance** model presenting roles & responsibilities.
- II a linear management **lifecycle**, dividing the life of a programme to discreet management phases.
- III a set of iterative **management activities** that are executed throughout the programme.
- IIII a set of recommended management **Artefacts** (i.e. documentation templates)

The spirit of PM<sup>2</sup>-PgM Methodology is defined by the Programme **Mindsets**, which provide a common set of beliefs and values for organisations and teams implementing PM<sup>2</sup>-PgM.

## The PM<sup>2</sup>-PgM Methodology provides answers to the following fundamental questions:

**What** programme management activities need to be performed to manage the programme? What are the desired outcomes of each management activity or artefact produced?

**How** will each activity and artefact be implemented? What are the skills required? What are the tools, techniques or technologies that will be used?

**When** do the programme management activities need to be executed or management artefacts produced? How often (for recurrent activities)?

**Who** is responsible for each management activity or artefact? What is the distribution of responsibilities among the programme team?

**Why** do we need a methodology? Why should we be executing a specific programme management activity? Why should we be producing the recommended programme artefact? Why is an activity or artefact needed in a specific phase or executed with the recommended frequency?

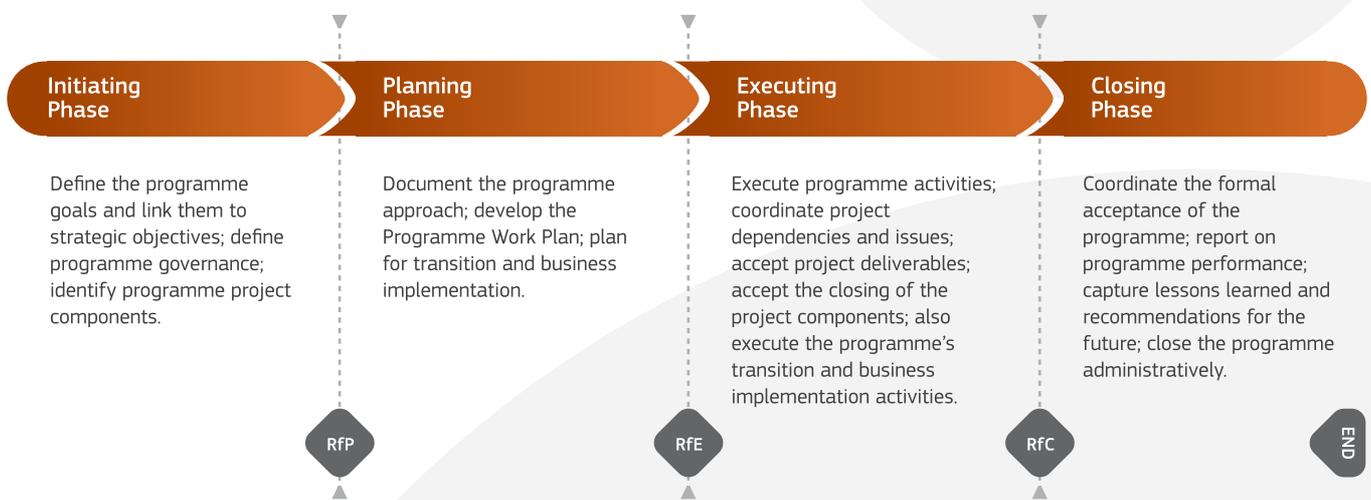
# The PM<sup>2</sup>-PgM Lifecycle

All programmes have a beginning, a middle, and an end. Since programmes can last for a long time, it is useful to divide their overall timespan into smaller periods called Phases. This division is done based on the common characteristics of the management activities executed during that period. In other words, the PM<sup>2</sup>-PgM Phases group related programme management activities together and help the programme to focus on the phase activities and their objectives.

## Phases

PM<sup>2</sup>-PgM provides a simple and effective Lifecycle which organises programme management activities into four sequential and non-overlapping Phases (Initiating, Planning, Executing, Closing) and into one overarching process (Monitor & Control).

*Note that even though the names of the PM<sup>2</sup>-PgM Phases are identical to the PM<sup>2</sup>-PM Phases, the programme management lifecycle is distinct from the project management lifecycle.*



## Phase Gates

During each of the PM<sup>2</sup>-PgM Phases, specific programme management objectives need to be achieved. The programme can then be allowed to move forward to the next Phase, based on the degree to which they have been achieved. Therefore, at the end of each phase, the programme passes through a review and approval gate.

Phase Gates allow the programme to proceed in a more controlled way by providing quality control points which contribute to the overall programme management quality. This ensures that the programme is appropriately reviewed before it moves on to the next phase, with an assessment of whether the activities, outputs and objectives set for that Phase have indeed been achieved.

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.

END

**Programme End:** with the completion of the Closing Phase.

## Programme Stages

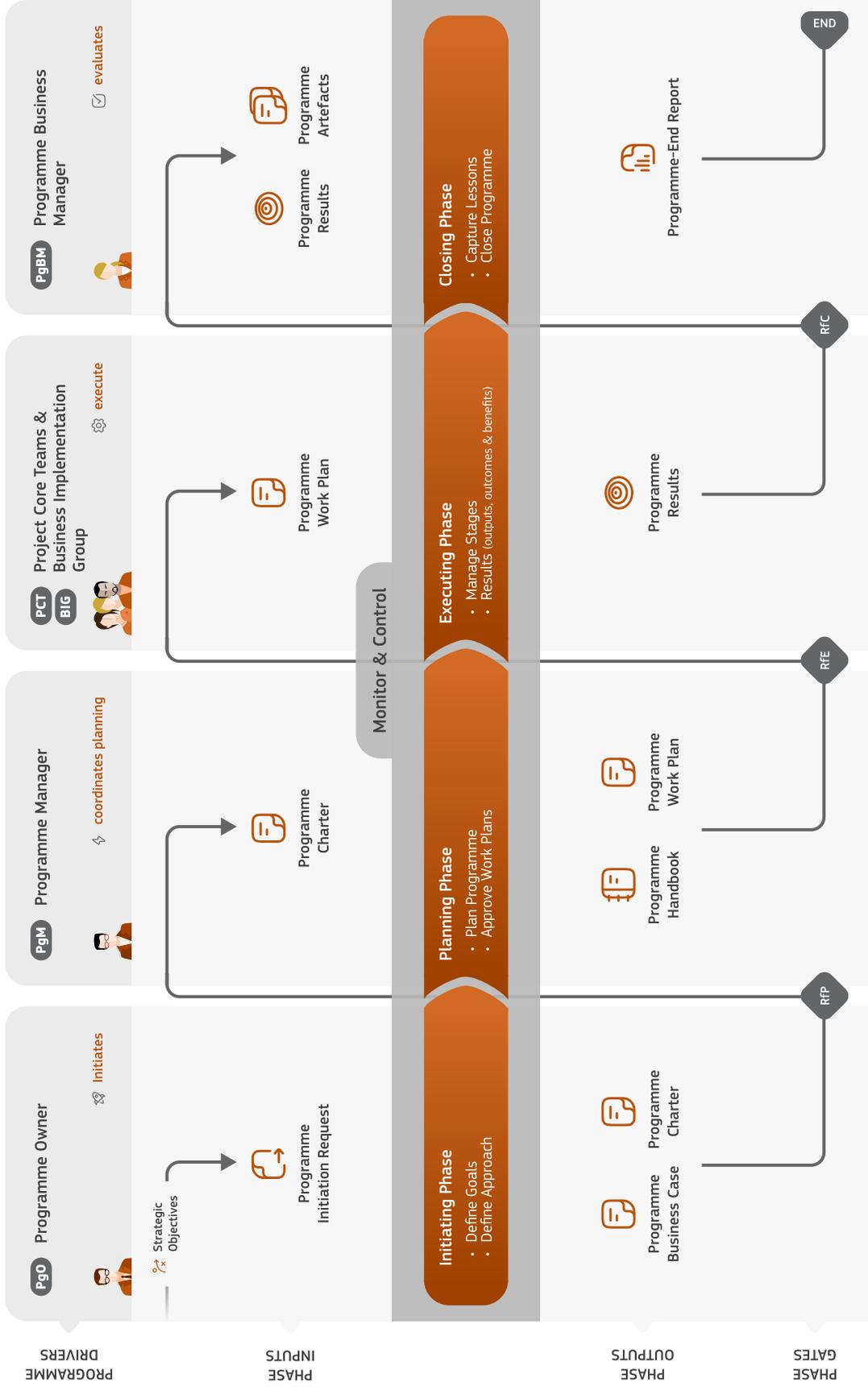
In addition to the Phases, PM<sup>2</sup>-PgM also accommodates the additional division of the programme lifecycle into smaller periods of time called Stages. The number and length of these stages depends both on the duration of the programme and on the incremental release of project deliverables - particularly as these relate to the staged achievement of programme outcomes during the Executing Phase.

During the lifecycle of the programme, a level of additional stage-planning can take place to refine the goals of the upcoming Stages and plan in more detail the transition and business implementation activities that have been defined during the Planning Phase. At the end of each Stage, a Stage Review can be organised to review the performance and results of the Stage, and to capture lessons learned that can help achieve the goal of continual improvement.

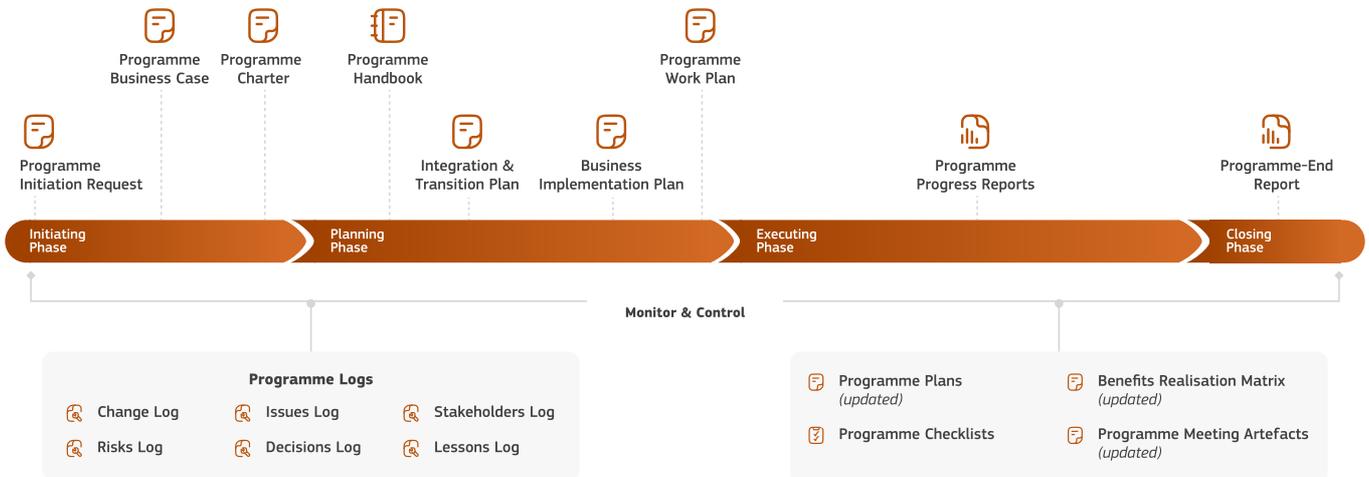
The programme Stages can be of variable lengths or of a fixed length, in which case the staged release and reporting of programme results can match the quarterly, semestrial and annual reporting periods typically used by organisations.

The programme Stages can also group the business implementation activities which have been planned for the programme in order to realise the outcomes and intended benefits of the programme.

# PM<sup>2</sup>-PgM Swimlane Diagram



# Key Artefacts



## Selected Descriptions

### Programme Initiation Request

Captures the programme idea and mandates the Initiating Phase of a programme.

### Programme Business Case

Presents the programme goals and provides both a connection to the organisational objectives and a business justification for the funding of the programme investment.

### Programme Charter

Defines the programme boundaries, the project components, and the programme's roadmap and budget.

### Programme Handbook

Describes the overall programme management approach, along with the responsibilities of each programme management role.

### Programme Work Plan

Documents the programme activities and programme stages, as well as the key project activities and milestones.

### Programme Integration & Transition Plan

Documents the activities relating to the integration and transition of the results of the programme's project components.

### Programme Business Implementation Plan

Documents the programme-level business implementation activities, along with the benefits realisation plan.

### Programme-End Report

Summarises the programme's performance, captures important lessons learned from the programme experience, and provides post-programme recommendations.

### Logs

A set of documented records that help in tracking and managing critical aspects of a programme's lifecycle. These logs serve as essential tools for capturing, and managing stakeholders, changes, risks, issues, decisions, and lessons throughout the programme lifecycle.

### Programme Reports

Provide insights into both the status and the efficacy of a programme and its components, along with its business implementation goals for value creation, presenting the actual achievement of the programmes's objectives.

### Checklists

Are structured lists that outline key activities, goals, and criteria necessary to manage various aspects of a programme's lifecycle effectively. They serve as practical tools to ensure that all necessary steps are considered throughout the programme management phases and processes.

# Governance

Governance is the framework within which decisions for the management of programmes are made. It defines all management roles and their associated responsibilities.

The Roles are essentially defined by the management responsibilities assigned to them, whereas responsibilities describe what each role needs to be concerned with, their domain of (management) work and level of authority.



## Business Governance Layer



### Appropriate Governance Body (AGB)

As the ultimate decision-making body, the AGB approves the programme goals and budget and authorises the initiation of the programme. It also authorises the closure of the programme (i.e. termination).

## Steering Layer



### Programme Steering Committee (PgSC)

The Programme Steering Committee (PgSC) comprises the Programme Owner (PgO), Programme Business Manager (PgBM), and Programme Manager (PgM). Other expert roles can participate as needed. The Programme Steering Committee (PgSC) is responsible for realising the programme's objectives and benefits.

## Directing Layer



### Programme Owner (PgO)

The Programme Owner (PgO) is accountable for the programme's success, whereas the day-to-day management of the programme is delegated to the Programme Manager (PgM), who focuses on achieving the programme outcomes.

## Programme Layer

### Managing Layer



### Programme Business Manager (PgBM)

Responsible for realising the intended benefits, based on the programme outcomes.



### Programme Manager (PgM)

Responsible for programme management activities with a focus on programme deliverables and outcomes. Provides an additional layer of coordination for the programme's components.



### Programme Support Team (PgST)

Supports the Programme Management Layer or management-related activities. May also provide project management support to the Project Layer.

## Implementation Layer



### Business Implementation Group (BIG)

Members of this group assist the Programme Business Manager (PgBM) in Business Implementation.

## Project Layer

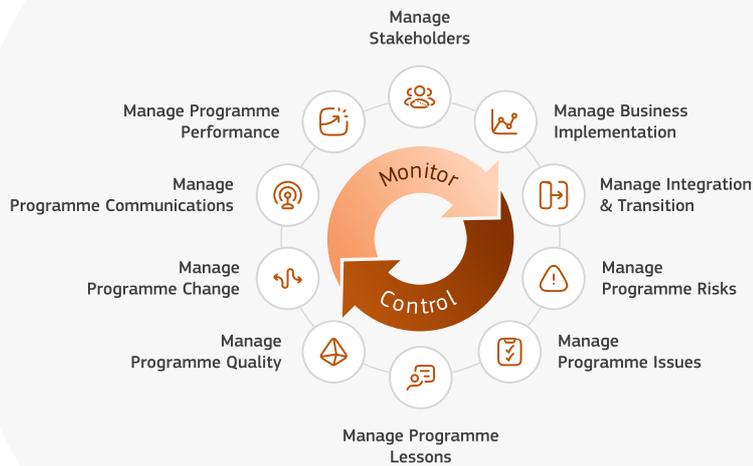


### Project Manager (PM)

Responsible for the management of a Project.

# Monitor & Control

The PM<sup>2</sup>-PgM Monitor & Control Process defines several management activities which are executed throughout the programme's life. Through the execution of these activities, organisations and programme teams apply commonly accepted best practices that help them achieve the programme's objectives in the most efficient way.



Each activity is described along with guidelines for their effective application.

These guidelines describe the activities (what) and their purpose (why), as well as the distribution of the responsibilities for their execution (who). They indicate the timing of their execution, and their frequency in the case of recurrent activities (when), and provide guidelines for their execution (how).



## Manage Stakeholders

Engages stakeholders by establishing two-way communication throughout the programme lifecycle, ensuring alignment, involvement, and exchange of information for successful programme delivery and effective management of stakeholder expectations.



## Manage Programme Change

Addresses programme changes by identifying, assessing, and documenting changes in scope, schedule, and objectives to ensure alignment with evolving organisational priorities and mitigate political risks.



## Manage Programme Risks

Identifies and mitigates potential risks affecting programme objectives through assessment and proactive risk management strategies, ensuring alignment with the organisation's risk appetite.



## Manage Programme Issues

Identify, assess, and resolve issues throughout the programme lifecycle. Issues are tracked in logs, decisions are made or escalated, and continuous monitoring ensures timely resolution to minimise disruptions and maintain progress.



## Manage Programme Quality

Ensures programme processes and deliverables meet defined standards through continuous assurance, control measures, and monitoring. It reduces risks, promotes improvement, and ensures alignment with objectives, while addressing issues throughout the programme lifecycle.



## Manage Programme Communications

Ensures two-way stakeholder communication throughout the programme. It involves planning and executing tailored communication activities to align expectations, facilitate consultations, exchange ideas, and disseminate updates.



## Manage Programme Performance

Involves monitoring and controlling programme activities, collecting performance data, analysing deviations, and implementing corrective actions. It ensures alignment with programme objectives by continuously assessing scope, cost, time, quality, and business implementation goals.



## Manage Integration & Transition

Defines goals, prerequisites, and strategies for integrating programme results, ensuring smooth transition, minimising disruptions, and facilitating efficient integration of outputs into the organisation, while controlling schedule, budget, and potential risks.



## Manage Business Implementation

Business Implementation focuses on achieving programme outcomes by assessing organisational impact and guiding change management, communication, and benefits realisation. It tracks performance indicators and benefits through a structured Benefits Traceability Matrix, supporting long-term value creation.



## Manage Programme Lessons

Captures and assesses lessons at both the programme and project levels, using them for continuous improvement. It occurs throughout the programme, especially at key milestones, and is documented in the Lessons Log, with final consolidation in the Programme-End Report during the Closing Phase.

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



Mindsets are the glue that holds the four PM<sup>2</sup>-PgM pillars together. They provide a common set of beliefs and values for all programme practitioners. The PM<sup>2</sup>-PgM Mindsets are the attitudes and behaviours that help organisations and teams focus on what is important in achieving their programme management objectives. They help programme teams navigate the complexities of managing programmes within their organisations and make the PM<sup>2</sup>-PgM Methodology both more effective and more complete.

## Programme teams that practice PM<sup>2</sup>-PgM:

1

**Apply PM<sup>2</sup>-PgM** best practices to manage their programmes.

2

**Remain mindful** that methodologies are there to serve the needs of their programmes, not the other way around.

3

Maintain an **outcomes orientation** in relation to all programme **and** programme management activities.

4

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

5

**Foster** a culture of collaboration, clear **communication**, and **accountability** within both the programme and the programme components.

6

**Assign** programme roles to the most **appropriate** people for the benefit of the programme.

7

**Balance** the programme's purpose, politics, and plan in the most productive way possible.

8

**Invest** in developing the personal competences necessary to **become better** programme contributors.

9

**Involve** stakeholders in the planning and executing of the **organisational changes** which are part of the achievement of the programme's goals.

10

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

11

Draw **inspiration** from the PM<sup>2</sup> Guidelines on Ethics and Professional Virtues.



## IAQs

To remain mindful of the PM<sup>2</sup>-PgM Mindsets, programme managers and team members should ask themselves the following important Infrequently Asked Questions (IAQs):

### Do we know what we are doing?

Tip: Develop a clear and shared programme vision and define the programme boundaries. Make a clear distinction between the overall programme goals and the scope of its project components.

### Do we know how to do it?

Tip: Because programmes have a long-term impact and their results take time to mature, focus on strategic navigation rather than tactical management. Manage the programme holistically and optimise the whole, not just parts of it. Follow a process but stay Agile to address the complexities that emerge. Actively manage the integration of project results and coordinate the transition at the programme level as well as the business implementation activities which, in the absence of the programme, would have been partially and less effectively tackled at the project levels.

### Do we know why we are doing it?

Tip: Make sure you understand the programme's goals, its value and impact, and how it relates to the organisational strategy. Define upfront what programme success is and deliver maximum value and benefits.

### Is this important?

Tip: Everything is NOT equally important. Identify and agree on the programme's Critical Success Criteria (CSC) and Critical Success Factors (CSFs) and allocate effort and attention strategically to achieve the programme goals. Prioritise the most complex aspects of the programme, such as managing change, managing politics, and engaging with stakeholders. To do so, apply the appropriate level of analysis and planning, but remain agile and adaptive with regard to handling emerging complexities.

### Do we know who is doing what?

Tip: Know what you should be doing, and make sure others know what they should be doing as well. Clearly define and understand roles, responsibilities, and accountabilities at both the programme and project levels.

### Are the right people involved?

Tip: People make programmes work. The primary criterion for involving people and assigning programme roles should be to serve the needs and objectives of the programme—not politics, friendship, functional hierarchy, proximity, or convenience.

### Deliver at any cost or risk?

Tip: Show respect for organisational funds and peoples efforts, and avoid high-risk behaviour and tactics. Always remember that it is not just about the end-result; how you get there matters, too. Manage your programmes based on positive values and principles.

### Is this a task for "them" or for "us"?

Tip: Resist managing the projects themselves. Instead, provide the appropriate leadership and create an environment (e.g. governance and systems) that provides a cohesive programme approach, but also allows for the necessary autonomy and control that projects need to be managed effectively.

### Have we improved?

Tip: Commit to ongoing self- and organisational improvement by gathering and sharing knowledge. Programme and project teams should reflect on how they can become more effective and adjust their behaviour accordingly.

### Is there life after the programme?

Tip: The results of the programme will have a long-lasting impact on many stakeholders! Make sure you have contributed to a successful and sustainable future.

# Quick Start Tips

The purpose of this section is to help you get started with using PM<sup>2</sup>-PgM programme management. Naturally, you will want to learn more about PM<sup>2</sup>-PgM, but keep in mind that you do not need to become an expert before initiating your programmes. Below, you will find our PM<sup>2</sup>-PgM Quick Start Tips, which aim to help jump-start you and your organisation in starting a programme with the PM<sup>2</sup>-PgM Methodology:

## 1 Discover the available PM<sup>2</sup>-PgM resources:

- Review the PM<sup>2</sup>-PgM Guide.
- Consult the PM<sup>2</sup>-PgM resources available online (e.g. articles, templates, discussions, etc.).
- Follow a programme management training.
- Share these resources within your organisation, teams, and stakeholders.

## 3 Organise a kick-off meeting:

- Formally kick off the process of using PM<sup>2</sup>-PgM for a new (or existing) programme.
- Ensure the right people are involved.
- Ensure that the basics of PM<sup>2</sup>-PgM and Programme Management are clear to all involved.

## 5 Document the Programme's relevance to the organisation's strategic objectives:

- Capture the programme's goals and boundaries.
- Provide a clear business justification.
- Identify the programme's stakeholder needs.
- Capture the high-level business risks, assumptions, and constraints.

## 7 Produce the Key Programme Artefacts

- Set up the Programme Logs (Change, Issues, Risk, Decisions, Stakeholders and Lessons Logs).
- Create a Programme Charter with a programme description, a programme budget, and a roadmap.
- Establish a Programme Work Plan.
- Document the Transition and Business Implementation objectives and activities.

## 9 Develop a plan on how to keep your Programme Stakeholders engaged and informed.

- Identify the Programme's key Stakeholders.
- Prepare a communications and Stakeholder engagement plan.
- Involve Stakeholders and keep them informed from the beginning.

## 2 Develop a higher degree of programme orientation:

- Understand the benefits of organising work as programmes.
- Understand the distinct focus of programmes (compared to projects).
- Take the PM<sup>2</sup>-PgM Mindsets on board.
- Get your organisation, team, and stakeholders on board.

## 4 Clearly define the Programme's Governance:

- Discuss the programme Governance and assign the Programme Roles.
- Review the specific responsibilities and achieve clarity.
- Clearly distinguish the Programme Roles and Responsibilities from the Project ones.

## 6 Define the Programme's management approach and documentation needs:

- Tailor PM<sup>2</sup>-PgM.
- Create the Programme Handbook to define the programme management approach.
- Define what programme artefacts (documentation) are required.

## 8 Plan the Programme's Monitor & Control activities.

- Understand the programme's monitoring and controlling needs.
- Align the programme and project monitoring and controlling activities.
- Put in place the information gathering infrastructure required for programme reporting.



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## PM<sup>2</sup>-PgM Highlights v.0.9

**Contact us:** [ec-pm2@ec.europa.eu](mailto:ec-pm2@ec.europa.eu)

<https://pm2.europa.eu/pm2-methodologies/pm2-programme-management>

