



Programme
Management
Methodology

Overview

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PM² Programme Management Methodology Overview



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1 Introduction

The purpose of PM² Programme Management Methodology (PM²-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.

Programmes are temporary flexible structures 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 achievement of the programme goals.

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.
- Define well-coordinated projects that deliver their outputs in a timely fashion.
- Initiate, plan, execute, monitor & control programmes.
- Manage cross-project dependencies or issues and effectively manage changes and risks.
- Incrementally achieve the pursued programme goals and benefits.
- Properly close the programme and its project components.

1.1 About this Publication

PM²-PgM presents an effective programme management methodology as part of the PM² Methodologies Suite. The PM²-PgM Methodology encapsulates globally accepted best practices, the operational experience of EU institutions, such as the European Commission, its Agencies and Bodies, and the European Parliament, as well as contributions from programme and portfolio management experts and practitioners.

The chosen strategy is to provide programme management guidelines that are lean, user-centric, and accessible to a broad and varied audience. The methodology offers a management model that is compatible with how projects and programmes are typically managed within most organisations (i.e. Matrix and Functional Organisations).

This overview publication does not present the full methodology but serves as an introductory companion to the PM²-PgM Guide, where the complete methodology guidelines are provided in detail.

This publication provides:

- An overview of the PM²-PgM Programme Management Model, introducing its structure and underlying principles for managing programmes within a coordinated governance framework.
- A summary of key elements of the methodology, including its lifecycle phases, governance structure, management activities, core artefacts, and supporting mindsets, intended to familiarise the reader with the main concepts and terminology.
- Quick start tips and general guidance, helping programme teams understand how to begin applying the methodology and where to focus initial attention.
- Reference tools and visual aids, such as diagrams, glossaries, and responsibility assignment matrices, which support understanding and facilitate communication.

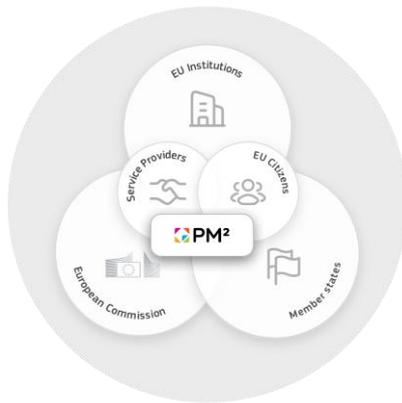
Intended Audience:

- Managers and staff within the EC that wish to learn how to organise their work as programmes.
- Project Managers (PMs) and project teams who wish to learn how their projects fit into a Programme, and how the project and programme management layers interact.
- Programme Managers (PgMs) who want to follow an effective methodology.
- Members of a Programme Support Office (PgSO) or a Project Support Office (PSO).
- Trainers and participants of the PM²-PgM programme management trainings.

1.2 The Methodologies Office

The purpose of the Methodologies Office is to provide the European Commission and European Union Institutions with high-quality management methodologies, support and advisory services. The Methodologies Office supports the PM² Methodology internally, coordinates an inter-institutional network, and offers the PM² Methodologies beyond the European Union Institutions through the Open PM² initiative and the Digital Europe Programme.

1.3 The Open PM² Initiative



Open PM² is a European Commission initiative, which brings the PM² Methodology and its benefits closer to its broader stakeholders and user community.

The Open PM² Initiative provides European Union institutions, contractors and public administrations, as well as broader stakeholders, with open access to the PM² publications and associated resources. Its goal is to enable increased effectiveness in the management of projects, programmes, and portfolios and, thus, to serve the objectives of the European Union and the needs of Member States and citizens.

The Open PM² Initiative aims to enhance project management competency within Europe, leading to increased project efficiency and success.

Opening PM² does this by:

- Harmonising management approaches across European Union Institutions and beyond.
- Establishing a common language and processes, resulting in effective project communication.
- Providing a common set of productive mindsets.
- Enabling transparency in cross-organisational project and programme collaborations.
- Enabling better project management, leading to improved cost/effort efficiency.
- Enabling the improved management of European Union-funded projects and grants.
- Applying the European Commission decision of 12 December 2011 (2011/833/EU) on the reuse of Commission documents to promote accessibility and reuse.

1.4 The PM² Suite of Publications

The PM² Methodologies Suite offers methods for the management of Projects, Programmes and Portfolios, each one comprising a series of publications that are aligned with each other and cover the varied needs for methodology guidelines of organisations and teams. The PM² Methodologies Suite comprises:

- The PM²-PM and PM²-Agile Methodologies for the management of projects.
- The PM²-PgM Methodology for the management of programmes.
- The PM²-PfM Methodology for the management of portfolios.

PM² Methodologies Portal: <https://pm2.europa.eu/pm2-methodologies/pm2-programme-management>

You can also find all PM² [Guides at the EU Bookshop of the Publications Office of the European Union](#)

2 Overview of the PM²-PgM Model

PM²-PgM methodology 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.

The purpose of the PM²-PgM is to help the Organisations implement Programme Management by providing them with a concise and complete framework within which effective programme management can take place.

PM²-PgM is supported by four pillars:

1. A programme management lifecycle (i.e. the Programme Phases).
2. A programme governance model (i.e. Roles & Responsibilities).
3. A set of activities (i.e. Programme management activities).
4. A set of programme Artefacts (i.e. documentation templates and guidelines).

The spirit of PM²-PgM is further defined by the Programme Mindsets, which provide a common set of beliefs and values for PM²-PgM teams.

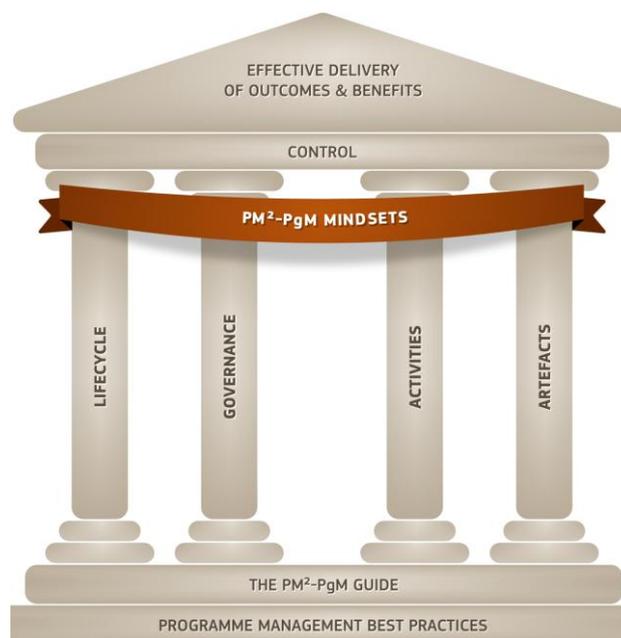


Fig. 2.1: The House of PM²-PgM

The PM²-PgM methodology provides answers to the following fundamental questions:

1. **What** programme management activities need to be performed to manage the programme? What are the desired outcomes of each management activity or artefact produced?
2. **When** do the programme management activities need to be executed or management artefacts produced? How often (for recurrent activities)?
3. **Who** is responsible for each management activity or artefact? What is the distribution of responsibilities among the programme team?
4. **How** will each activity be implemented and artefact be used and tailored? What are the skills required? What are the tools, techniques or even supportive technologies that will be used?
5. **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 with the recommended frequency?

2.1 PM²-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 PM²-

PgM Phases group related programme management activities together and help the programme to focus on the phase activities and their objectives.



Fig. 2.2: The PM²-PgM Programme Management Lifecycle (i.e. PM²-PgM Phases)

PM²-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 aforementioned PM²-PgM Phases are identical to the PM²-PM Phases, the programme management lifecycle is distinct from the project management lifecycle.

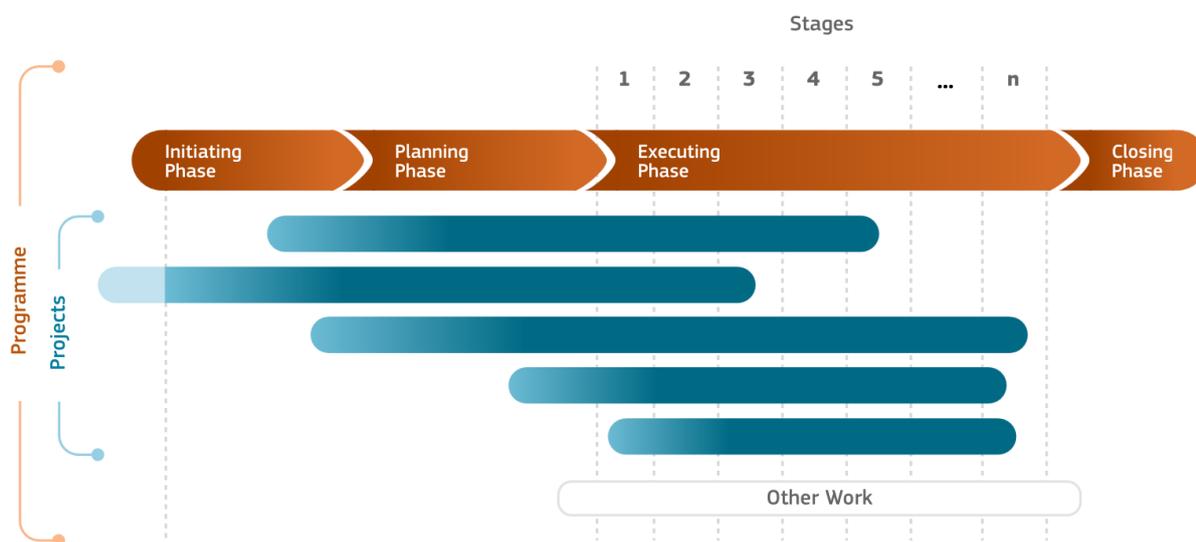


Fig. 2.3: Example of a programme project components in relation to the PM²-PgM Lifecycle

PM ² -PgM Phases	Description
Initiating	Secure a formal mandate to proceed, ensuring organisational commitment and readiness for planning. Define the programme’s goals, context, and alignment with strategic priorities. Establishes governance, outlines initial components, programme benefits, and sets up key artefacts.
Planning	Develop the programme management approach, including work planning, integration, and business implementation. Align roles, resources, and timelines across programme components to ensure coordinated execution readiness.
Executing	Execute programme activities and coordinate the implementation of programme plans, managing dependencies, integrating deliverables, and driving benefit realisation. Launch programme components and accept the closure of completed ones. Support ongoing stakeholder engagement and ensure structured delivery through staged execution and performance tracking.
Closing	Coordinate the formal acceptance of the programme. Report on overall programme performance. Capture lessons learned and post-programme recommendations for the future. Transfer ownership of remaining responsibilities and close the programme administratively.
Monitor & Control	Oversee the programme throughout its entire duration: monitor programme performance, measure progress, manage changes, address risks and issues, ensure outcomes and benefits delivery.

Table 2.1: Overview description of PM²-PgM Phases

Programme Stages

In addition to the Phases, PM²-PgM also accommodates the additional division of Phases into smaller periods of time called Stages. The number and length of these stages depend both on the duration of the programme and on the incremental release plans for 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 continuous 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 establish the outcomes and intended benefits of the programme.

Programme Phase Gates

During each of the PM²-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.

The three PM²-PgM Phase Gates (plus a final closing one) are:

- **RfP** (Ready for Planning): at the end of the Initiating Phase.
- **RfE** (Ready for Executing): at the end of the Planning Phase.
- **RfC** (Ready for Closing): at the end of the Executing Phase.
- **END** (Programme Closed): at the end of the Closing Phase.

The criteria for passing through a Phase Gate relate to whether the Phase's goals have been achieved and the Phase activities executed; demonstrable proof is required (e.g. relevant artefacts have been produced and formally accepted). When the criteria are not met, then a Phase can be prolonged, and actions taken to achieve the objectives of the Phase to an acceptable degree.

2.2 PM²-PgM Programme Governance

Programme Governance is the framework within which programme management decisions are made. It defines all programme roles and their associated responsibilities. Roles are essentially defined by the responsibilities assigned to them, which describe each role’s area of concern, scope of work, and level of authority.

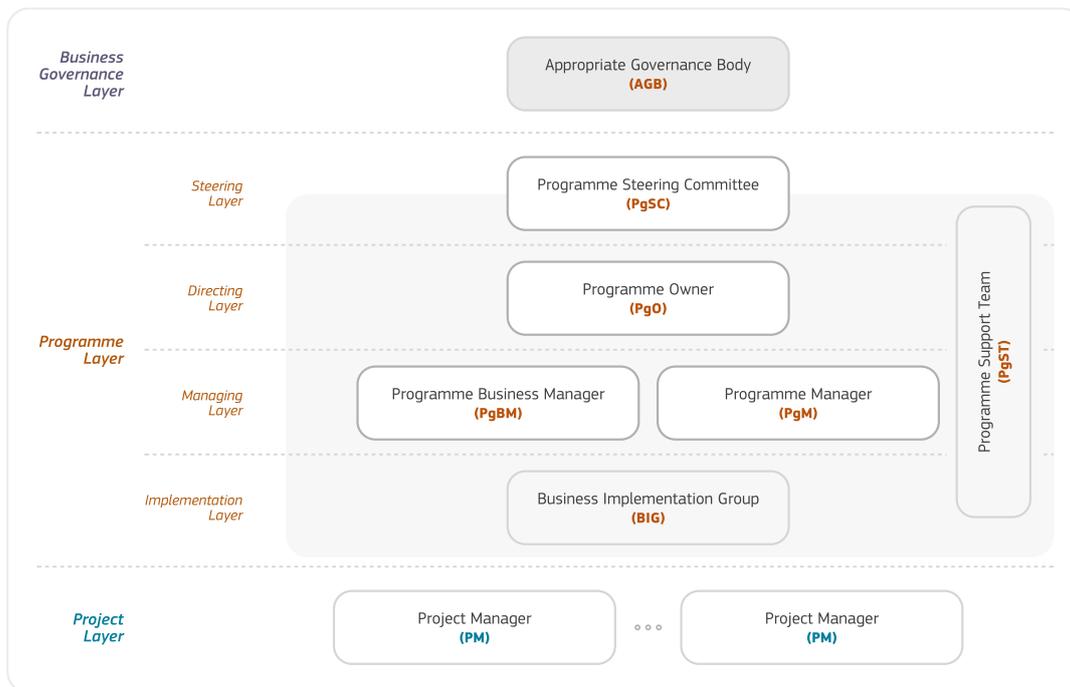


Fig.2.4: PM²-PgM Governance Model

PM ² -PgM Roles	Brief Descriptions
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).
Programme Steering Committee (PgSC)	The Programme Steering Committee (PgSC) is responsible for realising the programme’s objectives and benefits.
Programme Owner (PgO)	Accountable for the overall programme success. Provides strategic direction, ensures that its objectives align with business priorities, mobilises resources, and oversees business risks.
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.
Business Manager (PgBM)	Responsible for realising change management activities, and the intended benefits based on the programme's outcomes.
Business Implementation Group (PgBIG)	Assists the Programme Business Manager (PgBM) in Business Implementation.
Programme Support Team (PgST)	Supports the Programme Management Layer on management-related activities. Supports coordination of the inputs from the Project Layer to the Programme Layer. May also provide project management support to the Project Layer.
Project Manager (PM)	Responsible for the management of a Programme Component (e.g. Project).

Table 2.2 : Overview description of key PM²-PgM Roles

A description of the key PM²-PgM Responsibilities for each role is presented in section 5.

2.3 PM²-PgM Activities

The PM²-PgM Methodology defines several management activities which are to be executed throughout the programme lifecycle. Through the execution of these activities, Programme Managers (PgMs) can apply commonly accepted programme management best practices that help them achieve their programme management objectives.

PM²-PgM presents a wide range of such activities, along with guidelines on their application. These guidelines describe the activities (what) and their purpose (why), as well 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).

These management activities are presented throughout the PM²-PgM Guide, either directly as part of the Monitor & Control process and of the guidelines provided in the respective Management Plans, or indirectly in each of the four Programme Phases, as key Phase activities, as meetings, but also in the description of the PM²-PgM Artefacts.

Note that PM²-PgM is not exhaustively prescriptive. Rather, it aims to provide guidelines at the appropriate level of abstraction and detail which address the needs of a broad range of programmes. In addition, the PM²-PgM Mindsets aim to complement the guidelines and help develop a common understanding both true spirit of the methodology and the goals of programme management.

Nonetheless, the breadth and rigour of the PM²-PgM activities remains the responsibility of those who are managing the programme and should always be adapted to the organisational context, the maturity and the specific needs of the programme.

A description of the key PM²-PgM management activities is presented in sections 3 and 4.

2.4 PM²-PgM Artefacts

Documentation in programmes is an essential enabler for the effective initiating, planning, executing, monitoring & controlling, and closing of a programme. The purpose of programme documentation is to:

- Provide all stakeholders with a clear picture of the programme's goals and status.
- Facilitate communication with internal and external groups.
- Provide a baseline for monitoring and controlling a programme's progress.
- Document important decisions made.
- Provide the information required by audits (e.g. quality audits).
- Serve as a historical reference that can be used as input for future programmes.

Note that programme documentation should adhere to the organisation's quality standards regarding format and style. Above all, however, the documentation should fulfil its purpose and be reader friendly.

Determining what documentation is required is an important decision. The size, complexity and risk of the programme, as well as the quality requirements and expectations of the Programme Steering Committee (PgSC), will influence this decision.

A description of the key PM²-PgM Artefacts is presented in sections 3 and 4.

PM²-PgM Phase Drivers and Key Artefacts

Programmes depend on people to define, plan, manage and close them, however, different Roles become the drivers for each of the PM²-PgM Phases as they seek to achieve the objectives of each Phase.

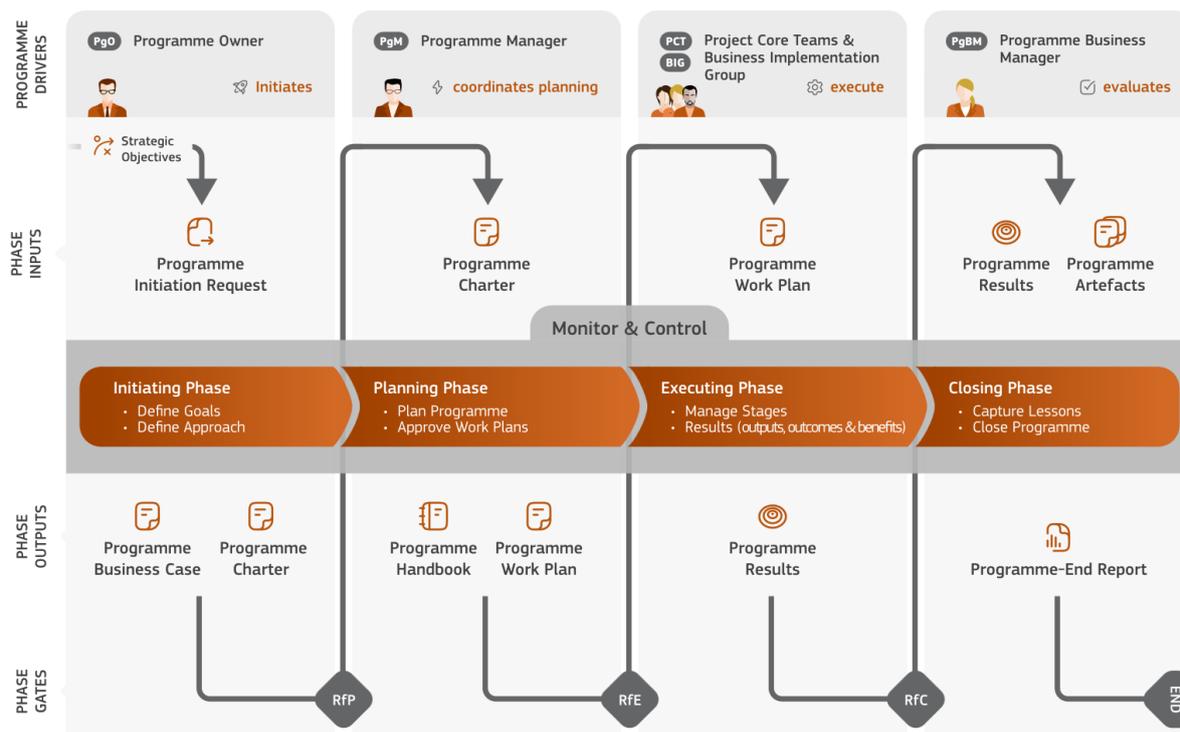


Fig. 2.5: PM²-PgM Drivers and Key Phase Input/Output Artefacts and Activities

All Programme Artefacts are developed iteratively and incrementally, therefore, the association of every Artefact with a single PM²-PgM Phase represents the ideal timing of its creation.



Fig.2.6: The PM²-PgM Artefacts Landscape

Key PM ² -PgM Artefacts	Description
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 programme’s project components, and the programme’s roadmap and budget.
Programme Handbook	Describes the overall programme management approach, activities, along with the responsibilities of each programme management role.
Programme Communications Plan	Defines the communication strategy, ensuring that stakeholders receive timely and relevant information about the programme’s performance.
Programme Work Plan	Documents the programme stages, milestones and activities, as well as key project 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 Logs	A set of records used to document and track key programme events, including stakeholders, risks, issues, decisions, changes, lessons learned, and benefits realisation.
Programme Status Report	Consolidate key programme information into structured updates on progress, performance, risks, issues, changes, and other critical areas for decision-making.
Programme-End Report	Summarises the programme's performance, captures important lessons learned from the programme experience, and provides post-programme recommendations.

2.5 PM²-PgM Mindsets

Each of the four pillars of PM²-PgM encapsulates a set of best practices which help programme teams manage the tangible dimensions of programmes better. On the other hand, as the fifth element of the methodology, the PM²-PgM Mindsets become the glue that holds the PM²-PgM pillars together. They provide a common set of beliefs and values for all PM²-PgM users and practitioners.

The PM²-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 PM²-PgM Methodology both more effective and more complete.

To remain mindful of the PM²-PgM Mindsets, Programme Managers (PgMs) and programme teams that practice PM²-PgM 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, which are 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 the 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 office politics, friendship, functional hierarchy, proximity, or convenience.

- **Deliver at any cost or risk?** Tip: Show respect for organisational funds 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 the temptation to manage the projects directly. Instead, provide the necessary leadership and create an environment that supports a cohesive programme approach while allowing the autonomy and control each project needs to be managed effectively.
- **Have we improved?** Tip: Commit to ongoing self- and organisational improvement by gathering and sharing knowledge. 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.

Thus, Programme Managers (PgMs) and programme teams that practice PM²-PgM:

1. **Apply PM²-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 the **Lessons Log**, and contribute to the **improvement** of programme management within their organisations.
11. Draw **inspiration** from the PM² Guidelines on Ethics and Professional Virtues (see Appendix E of the PM²-Guide for Project Management).

In summary, the PM²-PgM Mindsets help programme teams navigate through the complexities of programme management, help them focus on programme management goals, remind programme teams what is important for programme success, and serve as useful reminders of effective attitudes and behaviours.

2.6 Tailoring PM²-PgM

To ensure that the PM²-PgM Methodology effectively serves the needs of a programme and follows organisational requirements and standards, some degree of tailoring may be required.

Tailoring refers to changing specific parts of the methodology, such as processes, the number of Artefacts or their content, the distribution of responsibilities among the various roles, defining specific tolerance thresholds or action triggers, etc.

Programme teams should do this to adapt the methodology to the specific needs of their structure and culture, and to align the methodology with organisational processes, policies, etc. and address, for instance, the complexity, business domain, number of stakeholders, and even the size of a programme.

Before proceeding with the tailoring of PM²-PgM, consider the following guidelines:

- Understand the purpose and value of the element to be tailored before going ahead with its tailoring.

- Involve people who understand the organisation, programme, project, and business domains, and who are familiar with organisational standards, policies, and related practices.
- Avoid trying to simplify the methodology through the elimination of whole chunks (e.g. an entire process or activity, role, or artefact); instead, scale the scope of an element down (or up).
- Eliminate waste (lean approach) but remain aligned with the spirit of PM²-PgM, as this is captured in its management activities, artefacts, and Mindsets.
- Remember that PM²-PgM was designed as an integrated whole, so avoid unnecessary deviations.
- Consider organisational maturity and team competence.
- Involve key stakeholders and experts to perform the tailoring.
- All tailoring decisions should be documented in the PM²-PgM Programme Handbook.

2.7 Quick Start Tips

The purpose of this section is to help you get started with using PM²-PgM Methodology. Naturally, you will want to learn more about PM²-PgM, but keep in mind that you do not need to become an expert before initiating your programmes. Below, you will find our PM²-PgM Quick Start Tips, which aim to help jump-start you and your organisation in starting a programme:

1. Discover the available PM²-PgM resources:

- Review the PM²-PgM Guide and consult the PM²-PgM resources available online.
- Follow a programme management training.
- Share these resources within your organisation, teams, and stakeholders.

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 and portfolios).
- Take the PM²-PgM Mindsets on board.
- Onboard your organisation, team, and stakeholders.

3. Organise a kick-off meeting:

- Formally kick off the process of using PM²-PgM for a new (or existing) programme.
- Ensure the right people are involved.
- Ensure that the basics of PM²-PgM and Programme Management are clear to all involved.

4. Clearly define the Programme's Governance:

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

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 programme benefits as well as the high-level business risks, assumptions, and constraints.

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

- Tailor PM²-PgM.
- Create the Programme Handbook to define the programme management approach.
- Define what programme artefacts (documentation) are required.

7. Produce the Key Programme Artefacts

- Set up the Programme Logs.
- Create a Programme Business Case and Programme Charter with the programme's justification, description, a programme budget, and a roadmap.
- Establish a Programme Work Plan.
- Document the Transition and Business Implementation objectives and activities.

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.

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.

3 Guidelines per Programme Phase

This section offers a phase-based presentation of the PM²-PgM Methodology. Each phase presents phase-specific objectives, activities and artefacts.

3.1 Initiating Phase

The first phase of an PM²-PgM programme is the Initiating Phase. The Initiating Phase groups together the programme management activities necessary for the programme to get off to a good start. It is characterised by a set of activities, objectives, and management outputs (i.e. the Initiating Artefacts) which, together, help programmes focus on what is required to initiate a programme. Proper programme initiation is critical for effective programme planning and execution.



Fig. 3.1: The Initiation phase

The following sections provide an overview of the Initiating Phase activities, objectives, and Artefacts, and indicate which management responsibilities should be allocated to which Roles.

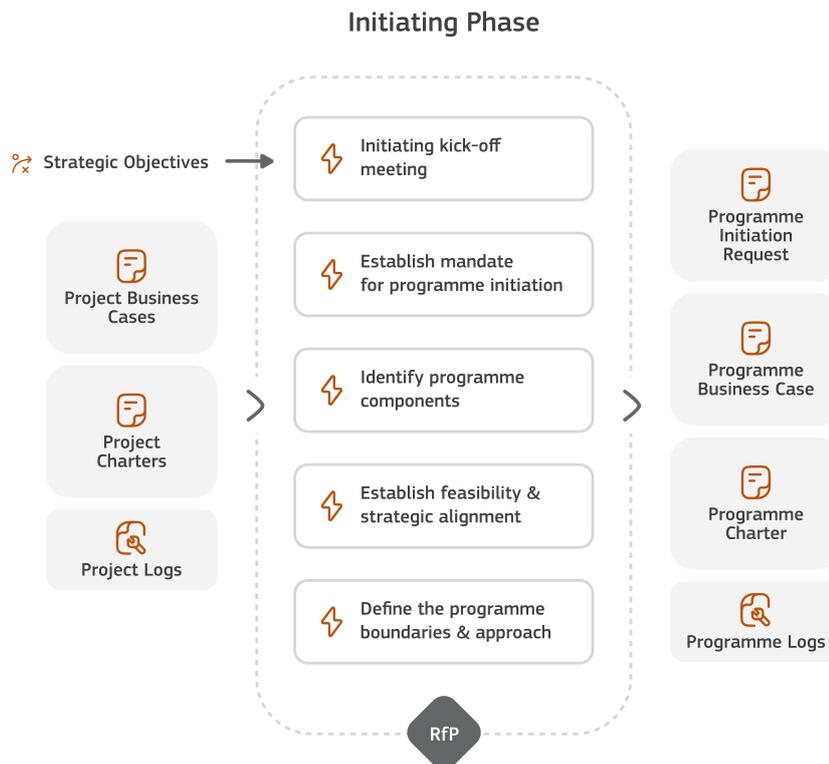


Fig. 3.2: Overview of the PM²-PgM Initiating Phase Activities and Input/Output Artefacts

One of the first steps that need to be done in the life of a programme is to understand its context and its relationship to the organisation's strategic objectives. The programme goals also need to be defined along with a clear business justification which links the programme's goals to organisational objectives. The outcomes and benefits the programme will seek to achieve also need to be defined, and the programme's boundaries established (i.e. in/out of scope, high-level budget, roadmap, business risk, management resources, etc.). The programme's viability and feasibility also need to be established.

It is also important to establish strong organisational commitment and support for the programme, secure the necessary organisational resources to move forward, align stakeholder expectations and secure their long-term commitment to contributing to the programme, and create an inspiring programme vision (purpose) that the programme (and project teams) can believe in and commit to.

Note that programme initiation is a process that can take several months to complete and may require the involvement of a significant number of stakeholders, effort, and budgetary resources. Therefore, it is important that a clear mandate for programme initiation is secured before the programme moves forward, e.g. via the acceptance of a Programme Initiation Request by the Programme Owner (PgO).

The last step in the Initiating Phase is a Phase Gate assessment of whether the initiating phase goals have been achieved, along with approval to move forward to the Planning Phase. Achieving the goals of the Initiating phase gets the programme off to a good start by minimising some of the most common (but avoidable) programme management risks, and, thus, eliminating common sources of programme failure.

Initiating Phase Objectives

Running the indicated programme management activities and producing the recommended Initiating Phase Artefacts is indispensable for the success of a programme. However, the whole endeavour will be less effective unless the specific Initiating Phase objectives are pursued. These objectives are:

- **To understand the organisational and strategic context** in order to ensure that the programme is aligned with overarching business priorities, external drivers, and long-term objectives.
- **To secure a mandate for initiating the programme** by obtaining formal authorisation to proceed with programme definition and planning activities.
- **To define the programme’s goals, intended outcomes, and expected benefits** in order to establish a clear rationale for investment and delivery.
- **To identify the programme’s project components** to structure the programme into manageable and logically connected initiatives that contribute to the programme’s strategic intent.
- **To align the programme’s business justification with organisational** strategy to confirm the value proposition and ensure continued relevance and support.
- **To establish the viability and feasibility of the programme goals** by assessing key assumptions, constraints, risks, and dependencies.
- **To define the programme boundaries and develop a high-level roadmap** to clarify scope, structure, phasing, and the expected progression of benefits realisation.
- **To secure management sponsorship and support, and achieve organisational commitment of the required resources** to enable effective programme setup and long-term delivery.
- **To agree on the programme management approach** in terms of governance, roles, processes, and reporting to ensure structured coordination across constituent projects.
- **To ensure that key stakeholders buy into the programme vision and align their expectations** to promote early engagement, ownership, and support.
- **To gain formal approval to proceed to the next phase** based on a validated strategic rationale, documented readiness, and initial delivery planning.



Fig. 3.3: Overview of the PM²-PgM Initiating Phase

Initiating Phase Activities and Artefacts

Three key programme artefacts are created during the Initiating Phase: The Programme Initiating Request, the Programme Business Case, and the Programme Charter. Due to the nature of programmes, both the Business Case and Programme Charter are created iteratively and incrementally, where the first versions contain high-level information and estimates, while later versions are refined as they iteratively integrate more detailed information received from the programme's project components.

The six **Programme Logs** are also set up (i.e. Stakeholders Log, Risk Log, Issue Log, Change Log, Decision Log and Lessons Log). The Programme Logs do not simply document programme events; they also provide a tool that facilitates the management of these events and the tracking of their status. The Programme Logs should therefore be set up during the Initiating Phase.

Additionally, any other domain-specific documentation (from the programme's project components) is created in line with the needs of the programme initiation and best practices in the specific project domain (e.g. technologies, product development, construction, events, etc.).



Fig. 3.4: The PM²-PgM Initiating Phase Artefacts

Initiating Kick-off Meeting: Is a preliminary gathering marking the start of the programme's Initiating Phase. It gathers key stakeholders, including the Programme Owner (PgO) and Programme Manager (PgM), to exchange perspectives, establish the programme's context, and align on goals and value to the organisation.

This meeting sets the stage for developing the Programme Initiation Request by reviewing relevant input, such as organisational strategy and lessons learned from similar initiatives. Participants collaborate to plan the next steps and ensure alignment on the programme's direction. The meeting serves as a critical milestone in securing the mandate for formal programme initiation. Its structure and formality are tailored to the programme's complexity and strategic importance.

Programme Initiation Request: Captures the essence of a programme idea, including its strategic context, desired outcomes, and high-level budget and timeline estimates. Its approval serves as a formal mandate, it authorises the resources needed for the Initiating Phase and the development of the Programme Business Case and Charter. Typically created after the Initiating Kick-off Meeting, it concisely articulates the programme's value, seeking the support of the Programme Owner (PgO) or Appropriate Governance Body (AGB). Using a standardised template, it outlines assumptions, constraints, risks, and a basic plan for the Initiating Phase targeting the Ready for Planning (RfP) gate.

Programme Business Case: Provides a detailed and convincing justification for a programme, linking its goals to organisational objectives and assessing the viability of achieving expected outcomes and benefits within identified constraints and risks.

It refines estimates of the programme's budget, timeline, and project composition beyond the preliminary insights of the Programme Initiation Request. Its purpose is to help decision-makers evaluate whether the programme is worth pursuing, based on its alignment with strategy and an objective assessment of its value. The Business Case can evolve with the programme and is reviewed alongside progress reports to ensure continued alignment.

Programme Charter: Defines the programme’s goals, boundaries, and key deliverables based on the objectives and business justification outlined in the approved Programme Business Case. It establishes a high-level roadmap with key milestones, constraints, assumptions, and risks, as well as the governance and management approach for overseeing the programme and its project components.

Its purpose is to provide a clear and shared understanding of the programme, align stakeholder expectations, and define boundaries to guide effective planning and execution. Developed after the approval of the Business Case, the Charter consolidates input from various stakeholders and the project layer, resulting in a detailed document that can be updated as needed through the change management process and with the relevant change approvals. Its formal approval in the Initiating Phase establishes the programme and ensures alignment across all levels of the organisation.

Programme Logs: The Programme Logs are set-up during the Initiating Phase. More about the Programme Logs can be found in Monitor & Control.

Phase Gate: Ready for Planning (RfP)

The Ready for Planning (RfP) Phase Gate marks the transition from the Initiating Phase to the Planning Phase, serving as a critical quality control point. Its purpose is to assess whether the planned actions, outputs, and goals of the Initiating Phase have been achieved. If gaps are identified, the phase may be extended, with corrective actions implemented to meet the set objectives.

This decision is based on an assessment typically guided by criteria in the Initiating Phase Exit Review Checklist. Approval relies on the successful completion of key artefacts, including the Programme Business Case and Charter, and is documented in the Decision Log. A well-executed RfP Phase Gate ensures the programme progresses in a controlled and quality-assured manner, enabling alignment with organisational standards and strategic goals.

The table below shows the allocation of the D-ARSCI responsibilities for the key Initiating Phase activities and Artefacts:

Initiating Phase	PgAGB	PgSC	PgO	PgBM	PgM	PgST	PMs
Initiating Kick-off Meeting	-	-	A	S	R	S	C
Programme Initiation Request	-	-	A	S	R	S	C
Programme Business Case	D	C	A	S	R	S	C
Programme Charter	D	A	S	S	R	S	C
Programme Logs (created)	I	I	I	C	A	R	S/C
Project Business Cases	-	I	-	C	A	S	R
Project Charters	-	I	-	C	A	S	R
RfP Phase Gate Assessment	I	A	C	S	R	S	I
RfP Phase Gate Approval	D	A	R	S	S	S	I

Table 3.1: The Responsibilities Assignment Matrix of the Programme Initiating Phase

3.2 Planning Phase

The Programme Planning Phase groups together the programme management activities required to prepare for the execution of the programme. It is characterised by a set of activities, objectives and outputs (i.e. the Planning Artefacts) which, together, helps organisations and teams focus on what is necessary to effectively undertake the upfront planning of a programme.

Due to the nature of programmes and their dependency on projects, planning activities will continue to be executed throughout the life of the programme. However, the upfront planning that takes place during a programme’s Planning Phase is essential for aligning the programme’s project components, for baselining the programme, and for setting stakeholder expectations.



Fig. 3.5: The Planning phase

The following sections provide an overview of the Planning Phase activities, objectives, and Artefacts and indicate which management responsibilities should be allocated to which Roles.

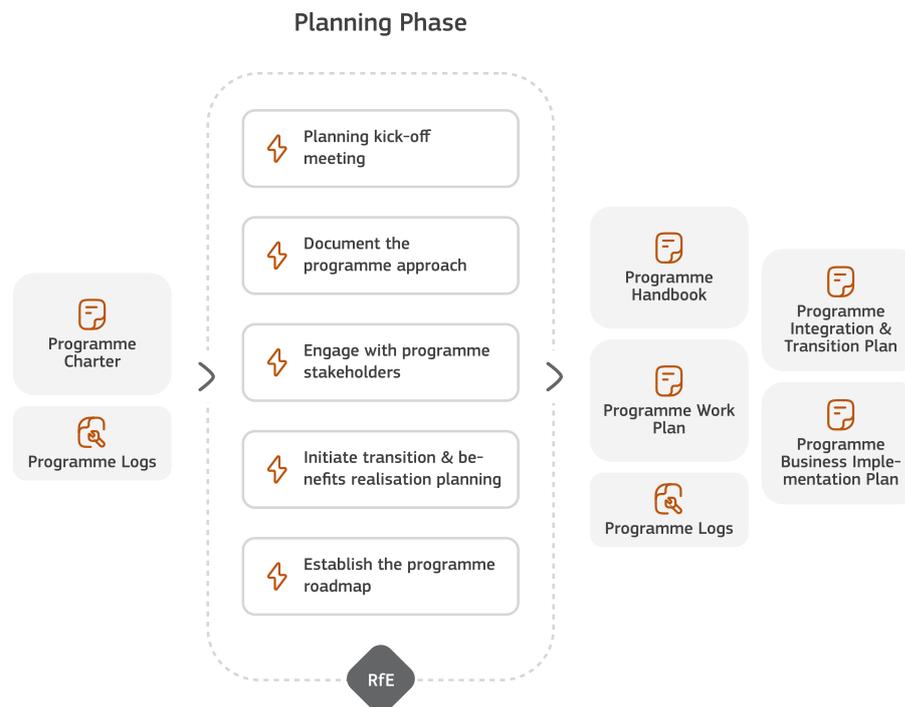


Fig. 3.6: Overview of the PM²-PgM Planning Phase Activities and Input/Output Artefacts

During the Planning Phase, the programme goals described in the Programme Charter are broken down, and relevant actions are planned and documented in the Planning Phase Artefacts. The Programme Work Plan consolidates key deliverables and milestones from the programme's project components (i.e. the Project Work Plans) and from programme-level activities to produce a programme schedule and estimates of the necessary resources and budget.

The effective planning of programmes requires the contributions of many stakeholders at various levels of the organisation, from senior management to Project Managers (PMs) and operational teams, to be coordinated. It is, therefore, important to secure the active support of the organisation via the sponsorship and involvement of the Programme Owner (PgO) and Project Owners (POs) before the programme's Planning Phase can be completed effectively, and the programme plans made ready for Execution.

Planning Phase Objectives

Executing the indicated management activities and producing the recommended Planning Phase Artefacts is indispensable for the success of a programme. However, the whole endeavour will be less effective if the specific Planning Phase objectives are not pursued and achieved to the highest possible degree. These objectives are:

- **To define, document, and communicate the programme management approach** in order to ensure a shared understanding of how the programme will be governed, managed, and coordinated.
- **To clarify the assigned roles and responsibilities** to support clear accountability and effective collaboration across the programme and its constituent projects.
- **To define the programme-level activities** that will guide the coordination, support, and oversight of project components and benefits realisation.
- **To define the integration and transition approach** to ensure the coordinated roll-out and adoption of programme deliverables.
- **To plan business implementation activities** and establish a structured approach for benefits tracking and realisation.

- **To establish strong links with the project level** (e.g. Project Managers) to ensure alignment between programme objectives and project delivery plans.
- **To develop a complete and realistic Programme Work Plan** that outlines stages, milestones, dependencies, and key management activities.
- **To gain formal approval for the Programme Work Plan and secure organisational commitment of the required resources** to enable implementation readiness.
- **To renew management sponsorship and support, and re-align stakeholder expectations** in light of updated programme plans, priorities, and constraints.
- **To establish confidence in the feasibility of the programme goals** by validating them against identified constraints, risks, and schedule targets.
- **To ensure that the programme and project teams buy into the programme vision** to ensure commitment, and motivation.
- **To keep stakeholders engaged and well-informed** through regular communication and involvement in planning and decision-making.
- **To complete the RfE Phase Gate assessment and obtain formal approval to proceed to the next phase** based on documented readiness and alignment with programme objectives.



Fig. 3.7: Overview of the PM²-PgM Planning Phase

Planning Phase Activities and Artefacts

Four key programme artefacts are created during the Planning Phase: The Programme Handbook, the Programme Work Plan, the Programme Integration and Transition Plan, and the Programme Business Implementation Plan. Given the nature of programmes, all the Planning Phase Artefacts should be created iteratively and incrementally, with the first versions containing high-level information and estimates, and later versions becoming more refined as they integrate more detailed information received from the programme stakeholders and project components.

The Programme Logs which have been set up in the Initiating Phase are also updated, while the Change Log, is also set up at the end of the Planning Phase, after all the other artefacts have been baselined.

Planning Kick-off Meeting: The Planning Phase begins with the Planning Kick-off Meeting, where the Programme Team and stakeholders review key Initiating Phase Artefacts, assign roles, and discuss the timeline, resources, and activities needed for effective planning. This meeting ensures alignment on programme goals, planning objectives, and responsibilities, ensuring stakeholder engagement and commitment.

The Planning Kick-off Meeting should be planned and run effectively as it is critical that the programme goals are well understood. A Meeting Agenda should be prepared to outline the goals of the meeting, and the Minutes of Meeting should be communicated to all the relevant Stakeholders.

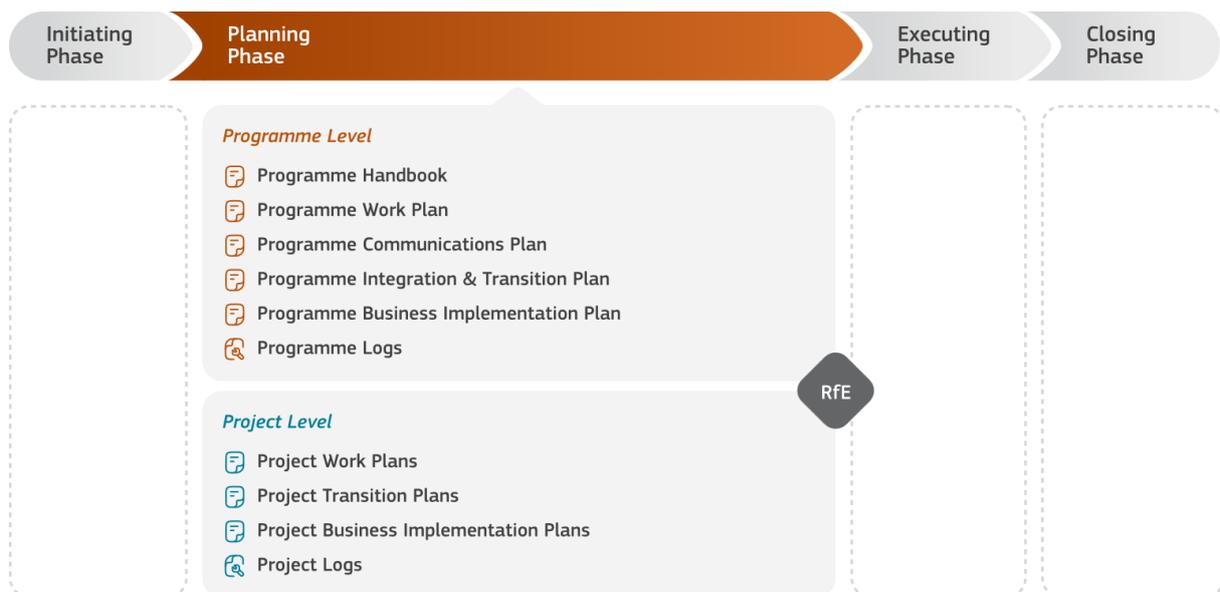


Fig. 3.8: The Key PM²-PgM Planning Phase Artefacts

Programme Handbook

The Programme Handbook documents the selected approach for reaching the programme goals. It documents the Critical Success Factors (CSFs), defines the key controlling processes to be used, the conflict resolution and escalation procedure, the programme policies and rules, and the programme mindsets.

The Programme Handbook also documents the programme governance roles and their responsibilities, and defines the plans necessary for managing the programme, as well as any methodology tailoring decisions. The Project Handbook contains the management plans for the project. The Programme Handbook and Project Handbooks are complementary to each other and should not overlap.

The programme goals and scope (found in the Initiating Phase documents) are key inputs to this artefact.

The Programme Handbook is an important reference document for all programme members and stakeholders, and along with the Programme Work Plan are the basis on which the programme is managed and executed.

The Programme Handbook defines a number of management processes. Depending on the programme and organisation, diverse levels of documentation detail of these processes may be required. When sufficient, a brief definition of each management process or plan can be provided in the Programme Handbook, otherwise, when a more extensive and detailed description of the processes is needed, separate management plans can be instantiated:

- Change Management Plan
- Risk Management Plan
- Issue Management Plan
- Quality Management Plan

Programme Work Plan: Consolidates information from project components, programme-level activities, and transition and business implementation plans to capture all work needed to achieve the programme goals. It serves as the master document for the programme's budget, schedule, and staged release plan, evolving iteratively during planning and execution phases. Created by the Programme Manager (PgM) with input from stakeholders, it ensures accurate resource allocation through detailed estimates and dependencies. The Work Plan facilitates the monitoring and control of programme activities, aligning project outputs with programme outcomes and managing integrations and transitions effectively.

It serves as the master document for planning, scheduling, and tracking programme execution, ensuring alignment between project deliverables and overarching programme objectives. Once developed and baselined, it remains a living document, updated throughout the programme lifecycle to reflect changes at the programme or project level.

The Programme Work Plan consists of three key sections:

- **Programme Breakdown:** Decomposes the programme into its project components, also incorporating programme-level activities for integration, transition and business implementation. It defines programme-level work packages and milestones, progressively refining details at lower levels to provide a clear picture of all efforts required. The level of planning detail should serve strategic decision-making at programme level. It does not replicate the individual projects' level of planning but proposes an integrated view of the projects' outputs directly linked to the programme objectives.
- **Programme Effort & Costs:** Based on the Work Breakdown, the required effort for each programme-level work package is estimated, rolling-up project-level inputs, and integrating them with programme-level resource needs. Assigned resources and effort calculations feed into the overall programme budget, providing a realistic financial framework.
- **Programme Roadmap:** Dependencies between programme activities and between projects are identified, establishing an integrated timeline for the programme, while more detailed scheduling may be refined iteratively. Staged release of project outputs, integration and transition, and business implementation activities are synchronised, ensuring a more controlled execution and delivery of outcomes.

By maintaining an up-to-date Programme Work Plan, the Programme Manager (PgM) can coordinate work across multiple project components, track progress at different levels, and ensure efficient resource utilisation. It provides a basis for monitoring and controlling the programme, managing interdependencies, and adjusting plans as needed to keep the programme aligned with its objectives.

Programme Communications Plan: Defines the framework for communications across the programme, ensuring stakeholders receive the information they need to perform their roles effectively. Communication in programmes is critical as it typically involves a wide range of stakeholders, from senior management to project implementation and operations teams. Programmes often last a long time, making ongoing communication essential to maintain alignment and stakeholder engagement throughout the lifecycle.

Additionally, programme communication can be highly political, requiring carefully planned and executed strategies to navigate complex dynamics. The plan outlines communication goals, activities, formats, frequencies, and target audiences, tailoring approaches to meet diverse needs and expectations. It also specifies programme-level communication processes, such as reporting timelines, feedback mechanisms, and escalation pathways, achieving transparency and coordination among all stakeholders.

Programme Integration and Transition Plan: Defines the goals, activities, and responsibilities for integrating results from programme components and transitioning to the new state. It identifies relevant risks, challenges, and strategies to ensure a smooth and coordinated roll-out of project outputs while minimising disruptions. It aligns with the programme stages and overall planning, ensuring that project outputs are smoothly incorporated into the organisation's environment. Developed by the Programme Manager (PgM) with input from the Business Manager (BM) and other key stakeholders, it evolves throughout the programme lifecycle as the programme and project Work Plans are refined. Stakeholder communication, training, and operational adjustments are key components for success. Proper integration of results and programme transition is a prerequisite for effective business implementation.

Programme Business Implementation Plan: Ensures that the programme's planned outcomes and benefits are realised by assessing its impact on processes, people, and organisational culture. It defines change management and communication activities while outlining a benefits realisation plan, which may extend beyond the programme's duration. Developed iteratively alongside the Integration and Transition Plan, it integrates business implementation activities from project-level work into the Programme Work Plan. The Programme Business Manager (PgBM) leads its development in collaboration with key stakeholders, ensuring alignment with organisational goals. The plan includes strategies for measuring benefits, managing disbenefits, and addressing resistance to change through stakeholder engagement and training. It also identifies cultural impacts, ensuring smooth adoption of new practices while minimising disruption. Communication and promotional activities support the integration of programme outputs into daily operations. Beyond programme completion, responsibility for ongoing benefits realisation remains with the organisation.

Programme Phase Gate: RfE (Ready for Executing): A review and approval are recommended before the programme can formally move to the next phase. The RfE (Ready for Executing) Phase Gate is a quality

control checkpoint that ensures the programme has met the objectives of the Planning Phase before moving forward, ensuring readiness for successful execution. It evaluates whether the programme’s plans, artefacts, and governance structures are complete and aligned with expectations and standards. The Programme Manager (PgM) with the support of the Programme Support Team (PgST) lead the assessment, working closely with the Programme Steering Committee (PgSC) and the Appropriate Governance Body (AGB) to secure formal approval. A structured assessment process, guided by a tailored Planning Phase Exit Review Checklist, determines if additional planning is required or if the programme is ready to proceed. The Programme Work Plan and Programme Handbook, as well as other key planning phase artefacts serve as primary inputs for decision-making.

If the assessment shows that the programme is not ready to move to the Executing Phase, the Planning Phase is prolonged to allow additional planning work to take place. In some cases, the programme may be delayed due to specific constraints, such as the inability to secure necessary resources. Lastly, if significant changes occur, such as changes in the organisational strategy or shifts in internal politics or external conditions that render the programme no longer viable, it transitions directly to the Closing Phase for proper administrative closure and to capture lessons learned.

The table below shows the allocation of the D-ARSCI responsibilities for the key Planning Phase activities and Artefacts:

Planning Phase	AGB	PgSC	PgO	PgBM	PgM	PgST	PMs
Planning Kick-Off Meeting	-	A	I	S	R	S	C
Programme Handbook	-	A	I	C	S	R	I
Programme Communications Plan	-	A	C	S	R	S	C
Programme Integration & Transition Plan	-	A	C	S	R	S	C
Programme Business Implementation Plan	-	A	C	R	S	S	S
Programme Work Plan	D	A	I	C	R	S	I
Projects Work Plan	-	-	-	C	A	S	R
Project Transition Plan	-	-	-	C	A	S	R
Project Business Implementation Plan	-	-	-	A	C	S	R
Project Logs	-	-	-	C	A	S	R
RfE Phase Gate Assessment	I	A	C	S	R	S	I
RfE Phase Gate Approval	D	A	R	S	S	S	I

Table 3.2: The Responsibilities Assignment Matrix of the Programme Planning Phase

3.3 Executing Phase

The third phase of an PM²-PgM programme is the Executing Phase. The Executing Phase groups the planned programme management activities intended to ensure the effective coordination of the programme’s execution and the reporting of its performance. The phase is characterised by a set of activities, objectives, and outputs (i.e. the Executing Artefacts) which, together, helps organisations and teams focus on what is necessary to effectively manage the delivery of the programme’s goals.



Fig. 3.9: The Executing phase

The following sections provide an overview of the Executing Phase activities, objectives, and Artefacts and indicate which management Responsibilities should be allocated to which Roles.



Fig 3.10: Overview of the PM²-PgM Executing Phase Activities and Input/Output Artefacts

Executing Phase is typically the programme phase that lasts the longest - it could well last for several years. By the end of the Executing Phase, all project deliverables will have been produced, the majority of the projects should be formally closed, and all programme transition and business implementation activities which have been viewed as part of the programme will also be complete.

Throughout the Executing Phase, the programme stakeholders collaborate dynamically on the execution of the programme plans and the coordination of the programme work. The project results are validated at regular intervals (i.e. the stages), so the results can be released incrementally and early. Programme components are also evaluated as the programme progresses. New projects could be initiated or changed, existing projects could be closed, depending on the achievement of programme objective. Resources (human and financial) could be re-allocated to better serve the achievement of the programme outputs and outcomes.

Executing Phase Objectives

Running the indicated management activities and producing the recommended Executing Phase Artefacts is indispensable for the successful execution of a programme. However, the whole endeavour will be less effective if specific Executing Phase objectives are not pursued. These objectives are:

- **To engage stakeholders throughout the Executing Phase** in order to maintain alignment, and ensure ongoing support and responsiveness.
- **To meet stakeholder expectations** by coordinating delivery and communication efforts across the programme and its projects in line with agreed objectives and commitments.
- **To ensure ongoing programme governance and assurance** through regular reviews, reporting, and alignment with oversight bodies.
- **To execute the Programme Work Plan and manage programme stages** to ensure timely delivery of outcomes and effective oversight of cross-cutting activities.

- **To coordinate across projects** to address interdependencies, resolve conflicts, and maintain coherence in delivery across the programme.
- **To manage shared resources and optimise their allocation across projects** to support coordinated delivery and address emerging capacity needs.
- **To accept and integrate projects and project deliverables** into the programme framework to enable the achievement of intended outcomes and facilitate business readiness.
- **To realise the programme's planned outcomes and benefits** by ensuring that project outputs are aligned with the overall programme vision and value proposition.
- **To achieve integration and transition goals** that enable the organisation to adopt new capabilities and sustain change effectively.
- **To complete business implementation activities** to support operational use of the delivered solutions and the embedding of new practices or services.
- **To accept the closure of all constituent projects** by ensuring formal completion, validation of outputs, and adherence to defined closure procedures.
- **To complete the RFC Phase Gate assessment and obtain formal approval to proceed to programme closure** based on verified achievement of objectives and readiness to transition to post-programme activities.



Fig. 3.11: Overview of the PM²-PgM Executing Phase Objectives

Executing Phase Activities and Artefacts

Although the Executing Phase is typically the longest of the phases in duration, and many recurrent management activities take place during that period, the only PM²-PgM Executing Phase Artefacts are the Programme Status Report. Of course, other programme-level reports can also be created and distributed, as needed.

Note that although many programme Artefacts are also updated during the Executing Phase, these are associated with (i.e. created in) other PM²-PgM Phases and their updating is an output of the monitor and control activities (see section Monitor & Control).

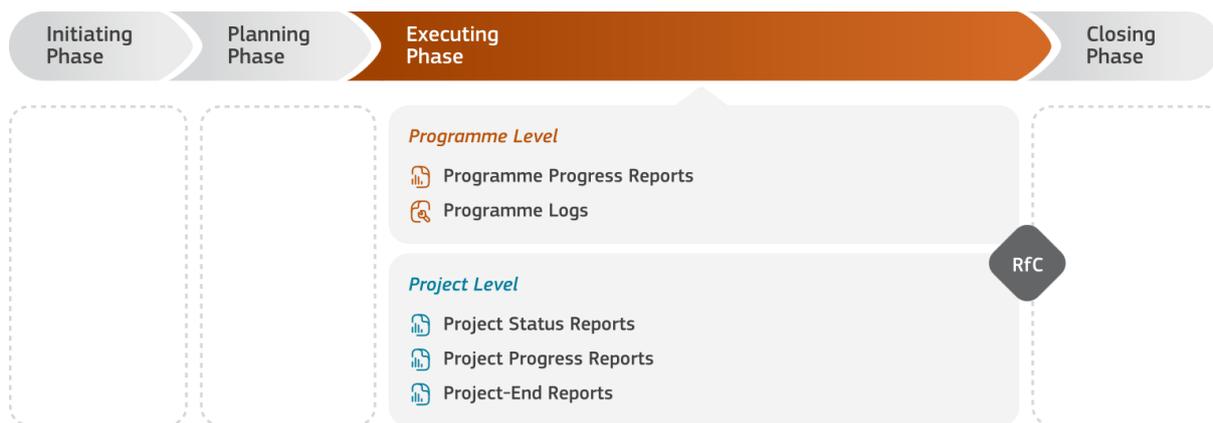


Fig. 3.12: The PM²-PgM Key Executing Phase Artefacts

Executing Phase Kick-off Meeting: formally initiates the Executing Phase, ensuring that all programme team members are aligned with the programme’s goals, schedule, and the management approach. It provides an opportunity to review the Programme Work Plan, Programme Integration and Transition Plan, and Programme Business Implementation Plan, ensuring clarity on responsibilities, dependencies, and execution strategies. The Programme Manager (PgM), supported by the Programme Support Team (PgST), is responsible for organising the meeting and making the necessary artefacts available to participants. Representatives from the programme management team and project components are required to attend, facilitating cross-team coordination and alignment. The meeting agenda covers key programme management aspects, including stakeholder engagement, risk and issue management, change control, quality assurance, and communication strategies. A structured discussion ensures that programme roles, conflict resolution process, and escalation procedure are well understood. The meeting’s success is measured by stakeholder engagement, clear role definition, and documented action points captured in the Minutes of Meeting (MoM). These minutes, along with identified risks, issues, and decisions, are shared with stakeholders and recorded in relevant programme logs.

Programme Coordination: Ensures the effective execution of the Programme Work Plan by synchronising programme and project-level activities, managing resources, and maintaining alignment with programme goals. It involves continuous communication with Project Managers (PMs), quality checks on programme stage results, and proactive leadership to resolve conflicts and maintain team motivation. Led by the Programme Manager (PgM) with support from the Programme Business Manager (PgBM) and Programme Support Team (PgST), coordination efforts peak during the Executing Phase and continue until all planned work is completed. The Executing Phase Kick-off Meeting marks the beginning of intensive coordination activities, with Programme Stages providing additional milestones for alignment. Coordination relies on structured communication channels, trust-building, and clear decision-making processes to ensure priorities remain aligned across projects. By achieving collaboration, addressing challenges early, and ensuring work progresses efficiently, Programme Coordination contributes to organisational learning and reinforces a programme-oriented culture.

Programme Stages Management: Structures the Executing Phase into multiple stages, grouping project deliverables into controlled releases to facilitate execution, transition, and business implementation activities. Each stage provides intermediate milestones that improve manageability, enable earlier benefits realisation, and incorporate lessons learned into subsequent stages. Before starting a new Stage, an assessment will be made on the continuation of programme viability with the Programme Business Case adapted and approved as necessary. The Programme Manager (PgM), supported by the Programme Business Manager (PgBM) and Programme Support Team (PgST), oversees the planning and execution of stages, ensuring alignment with programme constraints and goals. Stages are defined during the Planning Phase and managed throughout execution, with each stage involving initiation, coordination, deliverables acceptance, and a formal Stage Review. The Programme Stage Plan, part of the Programme Work Plan, documents the execution and integration of project outcomes. Effective stage management ensures smooth transitions, timely deliverables acceptance, and structured programme progression. Each Stage Review feeds back into programme planning, reinforcing continuous improvement and optimising final programme outcomes.

Programme Reports: Provide structured and timely information on the state of the programme, tracking progress, budget, risks, issues, decisions, and changes that may impact its goals. They consolidate critical information to inform stakeholders, enabling them to assess performance and make informed decisions on programme execution and control. The Programme Manager (PgM), supported by the Programme Support Team (PgST), is responsible for creating reports based on inputs from the Programme Handbook, Programme Work Plan, and Logs, but also Project Status Reports. Reporting frequency is predefined in the Programme Handbook but can be adjusted based on programme needs. Reports are tailored to different stakeholders, ensuring the right level of detail and format for effective communication. The Programme Status Report provides an overview of programme activities as well as long-term performance, budget forecasts, and benefit realisation. Additional reports, such as Quality Review Reports, ad hoc reports, and Project-End Reports, offer deeper insights into programme health and continuous improvement. Well-structured and consistently used reports enhance transparency, support decision-making, and reinforce good programme management practices.

Programme Reporting: Ensures that relevant, accurate, and timely information about programme performance and benefits realisation reaches the appropriate stakeholders. It facilitates informed decision-making, maintains stakeholder engagement, and provides a historical record of the programme’s progress. The Programme Manager (PgM) is responsible for managing reporting activities, with input from the Programme Support Team (PgST), Programme Business Manager (PgBM), and Project Managers (PMs). Reports are created at predetermined intervals defined in the Programme Handbook or in response to exceptional circumstances. Reporting synchronisation across projects ensures consistency and alignment with programme milestones. Reports consolidate information from monitoring and control activities, documenting status updates, deviations, and proposed corrective actions. By maintaining structured reporting processes, programme teams enhance transparency, support proactive issue resolution, and ensure programme alignment with strategic objectives.

Phase Gate: RfC (Ready for Closing): Is a quality control checkpoint that ensures the programme has achieved the objectives of the Executing Phase before transitioning to the Closing Phase. The Programme Manager (PgM), supported by the Programme Business Manager (PgBM) and Programme Support Team (PgST), coordinates the assessment, verifying whether planned activities, outputs, and goals have been completed as defined in the Programme Charter and Programme Work Plan. The Programme Steering Committee (PgSC) and the Appropriate Governance Body (AGB) review the findings and decide whether the programme can proceed to closure. An Executing Phase Exit Review Checklist is used to guide the assessment, ensuring programme-specific criteria are met. If the evaluation finds that objectives have not been met, the Executing Phase is prolonged until completion. If approval is granted, the programme moves into the Closing Phase, where final administrative activities, documentation, and lessons learned are completed. A well-executed RfC Phase Gate ensures the programme transitions smoothly while maintaining quality and accountability.

The table below shows the allocation of the D-ARSCI responsibilities for the key Executing Phase activities and Artefacts:

Executing Phase	AGB	PgSC	PgO	PgBM	PgM	PgST	PMs
Executing Phase Kick-off Meeting	-	A	S	S	R	S	C
Programme Coordination	-	A	S	S	R	S	C
Programme Stages Management	I	C	A	S	R	S	C
Programme Reports	I	A	I	C	R	S	I
Project Status Report	-	I	I	C	A	S	R
Project-End Report	-	I	I	C	A	S	R
RfC Phase Gate Assessment	I	A	C	S	R	S	S
RfC Phase Gate Approval	D	A	R	S	S	S	I

Table 3.3: The Responsibilities Assignment Matrix of the Programme Executing Phase

3.4 Closing Phase

The final phase of an PM²-PgM programme is the Closing Phase. The Closing Phase groups together the programme management activities required to close the programme effectively. The phase is characterised by a set of activities, objectives, and management outputs (i.e. the Closing Phase Artefacts) which, together, help organisations and teams to focus on what is needed to effectively close the programme.

The following sections provide an overview of the Closing Phase activities, objectives, and Artefacts and indicate which management Responsibilities should be allocated to which Roles.



Fig. 3.13: The Closing phase

The Closing Phase groups together the programme management activities required for the programme to be administratively closed. Note that by the end of the Executing Phase, all programme results have been delivered (as described in the most recent baselined Programme Charter and Work Plan). Consequently, it is primarily programme management activities that still have to be completed.

Information on overall programme performance and lessons learned is captured in the Programme-End Report. The programme results are formally accepted, all programme documents are properly filed and archived, and all resources used by the programme are formally released. It is important to also celebrate the achievements of the programme by inviting all the members of the programme and its projects to the celebratory event.

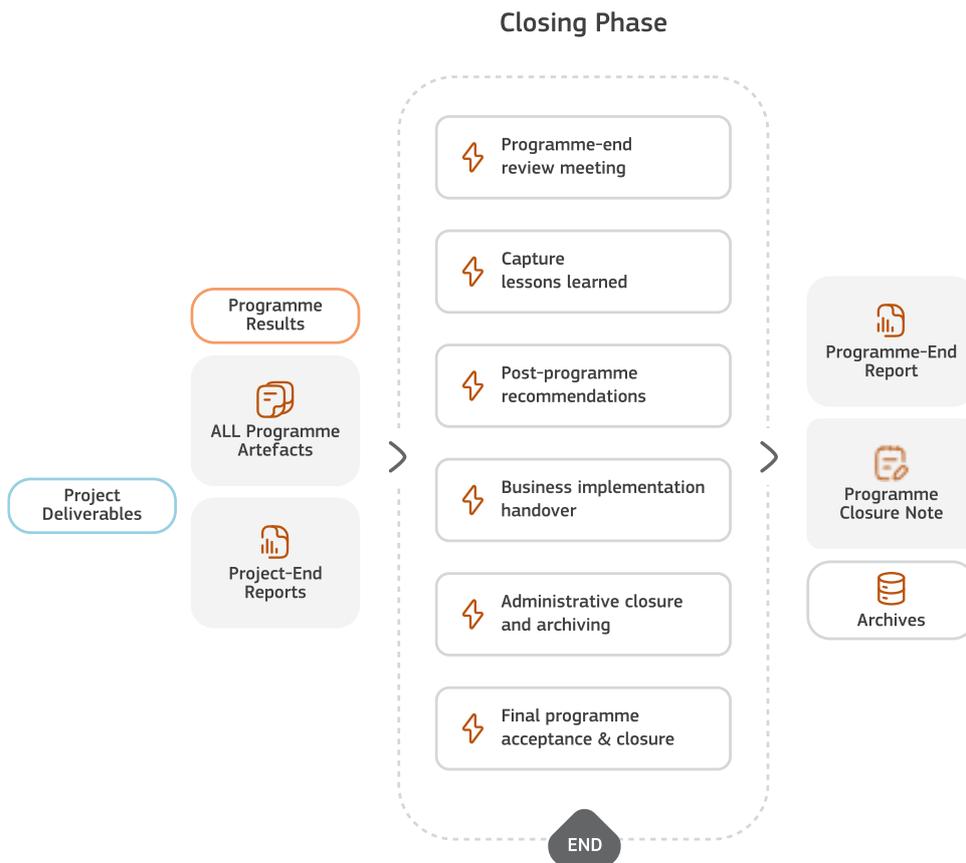


Fig. 3.14: Overview of the PM²-PgM Closing Phase Activities and Input/Output Artefacts

Closing Phase Objectives

Running the indicated management activities and producing the recommended Closing Phase Artefacts are best practices that should be followed. However, the whole phase will be less effective if the specific Closing Phase objectives are not pursued. These objectives are:

- **To evaluate the overall programme experience and performance** in order to assess what worked well, what did not, and how future programmes can benefit from these insights.
- **To discuss and capture lessons learned** through structured debriefings, and register them in a knowledge database to support organisational learning and future initiatives.
- **To share lessons learned across the organisation** to promote knowledge transfer, prevent recurrence of issues, and improve the management of future programmes and projects.
- **To devise, document, and share post-programme recommendations** that can inform strategic follow-up actions, process improvements, or future programmes and initiatives.
- **To ensure the transfer of ownership for any residual Business Implementation activities** and risks, to relevant business owners or operational units.
- **To archive all programme artefacts** to ensure proper documentation, traceability, and availability of historical records for auditing, reference, or learning purposes.
- **To administratively close the programme** by finalising financials, releasing resources, and completing all outstanding programme-level management activities.
- **To celebrate programme completion and support the emotional closure of team(s)** in order to recognise contributions, reinforce organisational culture, and promote future engagement.
- **To obtain formal programme acceptance and closure by the Programme Owner (PgO)**, based on the verified completion of all Closing Phase objectives and activities.



Fig. 3.15: Overview of the PM²-PgM Executing Phase Objectives

Closing Phase Activities and Artefacts

The Closing Phase is typically the shortest of all the phases in duration, and only two Artefacts are produced: the Programme-End Report and the Programme Closure Note.

Note that all programme Artefacts should be in their final versions and prepared for archiving.



Fig. 3.16: The PM²-PgM Closing Phase Artefacts

Programme-End Review Meeting: Is the final formal event in the programme’s lifecycle, bringing together programme team members and key stakeholders in a structured but open discussion environment. Its primary goal is to reflect on the overall programme experience, capturing Lessons Learned, best practices, and recommendations for future initiatives. The meeting also serves as an opportunity to evaluate programme and project team performance, discuss post-programme activities, and ensure that key insights are documented. Organised by the Programme Manager (PgM) with support from the Programme Support Team (PgST), the meeting marks the transition into the Closing Phase and is attended by the Programme Steering Committee (PgSC) and other stakeholders. Discussions are based on programme artefacts, including the Programme Charter, Work Plan, Reports, and Logs. Sessions focus on challenges, coordination efforts, business implementation, and sustainability of programme outcomes. A well-conducted review fosters knowledge-sharing, supports organisational learning, and provides key inputs for the Programme-End Report, ensuring the programme concludes with valuable insights for future initiatives.

Programme-End Report: Captures the overall experience of the programme, documenting successful practices, lessons learned, and challenges encountered, along with their solutions. It consists of three key sections: an overview of programme information and artefacts, a summary of lessons learned, and actionable post-programme recommendations. The report serves as a knowledge repository, supporting future programme initiation and continuous organisational improvement. Created by the Programme Manager (PgM) with input from the Programme Business Manager (PgBM) and Programme Support Team (PgST), it consolidates insights from the Programme-End Review Meeting, Project-End Reports, and various programme logs. The report aligns with organisational knowledge management practices, ensuring accessibility and long-term value. By structuring insights on effectiveness, stakeholder engagement, risk management, and business implementation, it enhances programme management maturity. A well-prepared Programme-End Report contributes to organisational learning, informs best practices, and supports future programme success.

Business Implementation Handover: Ensures that all completed Business Implementation activities and any outstanding implementation tasks are formally transferred to the programme’s benefit owners and operational owners for ongoing management. Since some Business Implementation activities may extend beyond the programme’s duration, this process ensures continuity by identifying responsibilities and providing necessary documentation. The handover takes place during the Closing Phase and must be completed before Administrative Closure. Led by the Programme Business Manager (PgBM) with support from the Programme Manager (PgM) and Programme Support Team (PgST), it is based on the status and results of the Transition and Business Implementation Plans, as well as the Benefits Realisation Matrix. This activity debriefs benefit and operational owners, ensuring they are fully informed and equipped to manage remaining tasks. A successful handover secures ongoing benefits realisation, and ensures a smooth transition to operational ownership.

Administrative Closure: Ensures the completion of all programme closure tasks, including finalising and archiving artefacts while fulfilling all management and administrative responsibilities. Led by the Programme Manager (PgM) with support from the Programme Support Team (PgST), it involves verifying the completion of closing activities, organising programme records, and confirming the transfer of outputs to their respective owners. A structured approach, supported by an Administrative Closure Checklist and a knowledge management system, facilitates efficient archiving and ensures valuable insights remain accessible for future reference and organisational learning.

Programme Closure Approval (END-Gate): Is the final governance checkpoint in the programme lifecycle, ensuring that all planned activities have been completed before the programme is formally closed. This gate serves as a quality control and validation step, confirming that the Closing Phase objectives have been met, all programme artefacts are finalised and archived, and all outputs, outcomes, and benefits have been successfully handed over to their designated owners. The assessment includes verifying the completion of the Business Implementation Handover and Administrative Closure, as well as ensuring that all Lessons Learned have been captured and documented. Once the Programme Owner (PgO) and the Appropriate Governance Body (AGB) formally approve the closure, the programme is officially concluded, marking the transition from programme management to post-programme operations or ongoing business activities. The outcome of this approval is the Programme Closure Note.

Programme Closure Note: A final artefact that formally marks the official closure of the programme. Issued after the Administrative Closure is completed and Programme Closure Approval is granted, it serves as confirmation of that decision. It provides a formal statement of closure acceptance, closing the programme governance framework.

The table below shows the allocation of the D-ARSCI responsibilities for the key Closing Phase activities and Artefacts:

Closing Phase	AGB	PgSC	PgO	PgBM	PgM	PgST	PMs
Programme-End Review Meeting	-	A	C	S	R	S	C
Programme-End Report	I	A	C	S	R	S	C
Business Implementation Handover	I	A	S	R	S	S	C
Administrative Closure	I	A	C	S	R	S	C
Programme Closure Approval (END-Gate)	D	A	R	S	S	S	I
Programme Closure Note	I	A	C	S	R	S	I

Table 3.4: The Responsibilities Assignment Matrix of the Programme Closing Phase

4 Guidelines for Monitoring & Controlling

Monitor & Control activities run throughout the programme’s lifecycle. Monitoring involves tracking the status of planned activities to assess their performance against set targets, while controlling focuses on identifying and implementing corrective actions to address deviations from plans.



Fig. 4.1: Monitor & Control

The PM²-PgM Monitor & Control process consolidates recurrent management activities related to stakeholder engagement, change management (both programme and organisational), risk and issue management, quality assurance, and other critical factors that influence programme success.

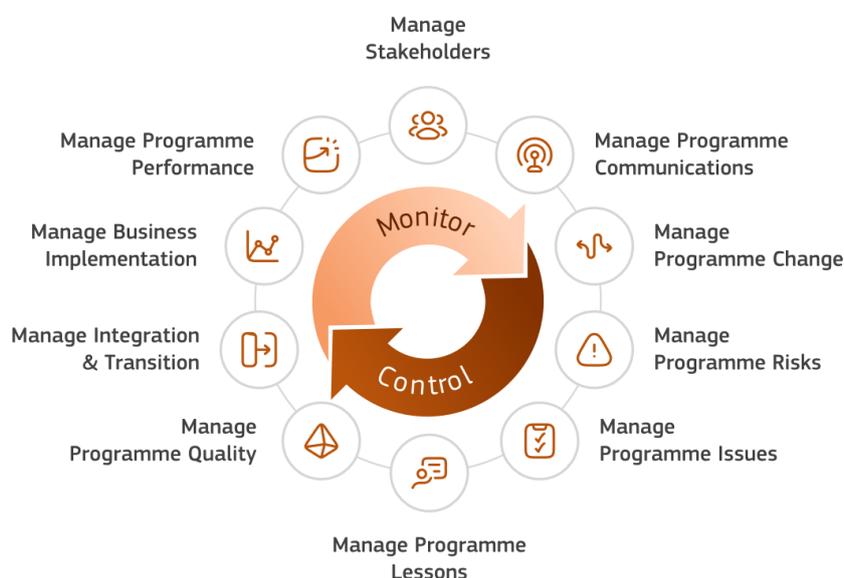


Fig. 4.2: Overview of the PM²-PgM Monitor & Control

The following sections provide an overview of the Monitor & Control activities, objectives, and Artefacts, and indicate which management Responsibilities should be allocated to which Roles.

Monitor & Control includes activities relating to the management of the whole programme. It includes monitoring programme performance parameters and controlling its progress by devising preventive and corrective actions.

Monitor & Control seeks to ensure that the programme is progressing as planned and to take corrective actions when the execution of the programme activities is not progressing as per the latest baselined plan, or when the actual programme results are not the expected ones.

The Monitor & Control activities are executed during every programme Phase. They start in the Initiating Phase and continue throughout the Planning and Executing Phases into the Closing Phase. They can run at predetermined intervals (triggered periodically), or as required (triggered by circumstances).

All Monitor & Control activities are executed under the responsibility of the Programme Manager (PgM), while the Programme Steering Committee (PgSC) remains accountable and approves any controlling actions. The Programme Support Team (PgST) also supports the execution and documentation of the management activities, while the Project Managers (PMs) provide information on the performance of their projects.

It is necessary to define upfront which planning indicators will be monitored to establish whether the programme (including transition and business implementation) is progressing satisfactorily. These indicators are documented in the Programme Handbook.

There are several performance indicators that are typically inputs into the Monitor & Control activities:

- Changes to the organisation's strategic objectives and/or to the programme environment.
- Programme - and Project - level risks and issues.
- Budget consumption and forecast.
- Milestone (and other) schedule delays.
- Management quality indicators (e.g. phase gates, checklists).
- Quality of the project deliverables and stakeholder feedback.
- Specific metrics for measuring benefit realisation.

The outputs of the Monitor & Control activities are documented in the Programme Logs and Programme Reports, while controlling decisions can trigger minor or major (re)planning, which can necessitate updates to the Programme Charter and Programme Business Case and changes to the composition of the programme's components.

Monitor & Control Objectives

Executing the recommended programme management activities and producing the necessary artefacts are best practices that should be followed. However, the effectiveness of the Monitor & Control process depends on pursuing specific objectives:

- **To perform monitoring and control activities consistently and regularly**, at a predetermined frequency or as needed, to maintain programme alignment and responsiveness.
- **To adapt monitoring and control efforts to the emerging needs of the programme** in order to respond effectively to internal changes and external developments.
- **To monitor programme performance accurately and implement timely corrective actions** to address deviations and keep delivery on track.
- **To track changes in the programme context, environment, and projects**, and ensure these are reflected in updated programme plans and decisions.
- **To facilitate the production of accurate reports on programme progress and overall status** to support informed decision-making at all levels.
- **To ensure effective and transparent communication across governance layers** to maintain alignment, accountability, and timely escalation where needed.
- **To maintain close stakeholder engagement** in order to gather valuable feedback and anticipate potential concerns or support needs.
- **To anticipate and manage stakeholder expectations proactively** to maintain commitment and avoid misalignment.
- **To reduce uncertainty, manage programme-level risks, and control changes effectively** in support of programme objectives and stability.
- **To enhance the quality of management processes and programme outcomes** through continuous oversight, reviews, and quality assurance mechanisms.
- **To track the progress of benefit realisation** throughout the programme lifecycle in order to ensure alignment with expected outcomes and take early action where needed.
- **To ensure adherence to PM²-PgM best practices** throughout the programme lifecycle in line with governance, methodology, and organisational standards.

Monitor & Control Activities

Monitor & Control encompasses various management activities, ensuring programme success through structured processes. These activities work together to ensure programme governance, performance optimisation, and long-term value realisation.

Manage Programme Performance: Encompasses the continuous monitoring and controlling of the programme to ensure that it remains aligned with its objectives, delivers expected benefits, and adapts effectively to internal and external changes. This involves tracking key performance indicators related to scope, cost, time, quality, risks, issues, and stakeholder engagement while assessing the overall effectiveness of transition and business implementation activities. Monitoring ensures that timely and accurate information is collected from programme components and the broader programme environment, forming the basis for decision-making.

Programme controlling builds on the monitoring data, analysing deviations from plans and expected results, identifying risks and issues, and implementing corrective actions where needed. The Programme Manager (PgM) leads this activity with the support of the Programme Business Manager (PgBM) and the Programme Support Team (PgST), ensuring that necessary adjustments are made while maintaining alignment with the Programme Business Case and Programme Charter. Corrective actions may involve fine-tuning programme plans, adjusting resource allocations, or modifying transition and business implementation strategies. In cases of significant deviations, recommendations may be escalated to the Programme Owner (PgO) or the Appropriate Governance Body (AGB) for approval.

The Programme Handbook defines the frequency and structure of monitoring and controlling activities based on the programme's size, complexity, and expected rate of change. Tools such as dashboards, variance analysis, trend forecasting, and risk assessments aid in evaluating programme performance. Performance data is consolidated in Programme Reports, and decisions are documented in the Decision Log to ensure transparency and accountability. By systematically monitoring, analysing, and adjusting programme execution, this activity helps mitigate risks, optimise resource use, and enhance the likelihood of achieving programme goals.

Manage Stakeholders: Maintaining alignment and ensuring the active participation of all relevant parties throughout the programme lifecycle. This activity involves establishing two-way communication channels, consulting stakeholders on programme goals and management decisions, and disseminating information in a timely and structured manner. The Programme Manager (PgM), supported by the Programme Business Manager (PgBM), leads these efforts, while the Programme Owner (PgO) plays a key role in engaging senior stakeholders and external parties. Engagement activities are planned during the Planning Phase and executed throughout the programme, with flexibility to address emerging needs. Effective stakeholder communication promotes collaboration, prevents misunderstandings, and ensures programme objectives are clearly understood. Communication strategies, including stakeholder expectations, engagement plans, and reporting mechanisms, are documented in the Programme Handbook and Stakeholders Log. By ensuring transparency, facilitating dialogue, and addressing concerns proactively, this activity enhances stakeholder commitment, mitigates risks, and contributes to the overall success of the programme.

Manage Programme Communications: Ensures that relevant, accurate, and timely information flows between the programme team and its stakeholders. It establishes structured communication channels, defines information needs, and sets reporting mechanisms to align with stakeholder expectations. By facilitating two-way communication, the activity keeps stakeholders informed, engaged in decision-making, and aligned with the programme's objectives. The Programme Manager (PgM), supported by the Programme Support Team (PgST), oversees communications, while the Programme Owner (PgO) may engage with senior stakeholders and external parties. The Programme Handbook and Communications Management Plan define what information is shared, with whom, how often, and in what format, ensuring consistency across the programme. By leveraging both formal and informal channels and adjusting approaches based on feedback, the programme enhances engagement and clarity. Documenting decisions, discussions, and their outcomes in artefacts, such as Meeting Minutes and the Project Logs, ensures traceability and accountability, supporting a well-informed and cohesive programme environment.

Manage Programme Integration and Transition: Ensures that programme results are effectively integrated into the organisation and that the transition from the pre-programme state to the post-programme state is well-managed. This process involves identifying challenges, defining integration strategies, and

executing transition activities as part of the Programme Work Plan. Successful transition minimises disruptions and facilitates the smooth adoption of project outputs, ensuring they are fully operational and aligned with business needs. The Programme Manager (PgM), supported by the Programme Business Manager (PgBM) and Project Managers (PMs), oversees this activity, ensuring coordination between project-level deliverables and business implementation. Key focus areas include meeting acceptance criteria, training users, transferring ownership, and initiating maintenance and support activities where applicable. Effective transition management requires structured planning, stakeholder collaboration, and rigorous monitoring to ensure that the programme's benefits are realised and sustained beyond its execution.

Manage Business Implementation: Focuses on preparing and managing organisational changes resulting from the programme, ensuring that programme outputs are effectively integrated into business operations. These activities go beyond technical transitions and involve process adjustments, stakeholder adaptation, cultural shifts, and benefits realisation. Business implementation is a long-term effort, often extending beyond the programme's duration, requiring operational owners to continue implementation activities as part of ongoing operations or future projects.

Led by the Programme Business Manager (PgBM) with support from the Programme Manager (PgM) and Programme Support Team (PgST), this activity is guided by the Programme Business Implementation Plan and aligned with the Programme Work Plan and Programme Integration and Transition Plan. Key tasks include assessing process, people, organisational and cultural impacts; defining and executing communication and change management strategies; tracking benefits realisation using Key Performance Indicators (KPIs); and managing deviations through corrective actions. Additionally, business continuity measures and cost-benefit assessments (e.g., ROI, TCO) help optimise implementation efforts. Effective business implementation ensures the sustainability of programme benefits, minimises operational disruptions, and secures long-term value for the organisation.

Manage Programme Risks: Involves identifying, assessing, and mitigating risks that could impact the programme's objectives, composition, or project components. This includes both direct programme risks and escalated project-level risks related to project scope, cost, time, and quality. Given the complexity and long-term nature of programmes, risk management is a core activity, requiring a proactive and structured approach. Led by the Programme Manager (PgM) with support from the Programme Business Manager (PgBM) and Programme Support Team (PgST), risk management activities begin in the Initiating Phase and continue throughout the programme lifecycle. The Programme Risk Log is the primary tool for tracking and managing risks, while a Risk Assessment Threshold Matrix helps visualise risk levels. Risk response strategies, such as avoidance, mitigation, transfer, or acceptance are selected based on cost-benefit analysis and are monitored to ensure effectiveness. Communication of risk status to stakeholders ensures transparency and proactive decision-making.

Manage Programme Issues: Involves identifying, assessing, and resolving events that would impact the programme's objectives if left unaddressed. Issues may arise from risks that have materialised, errors in programme management, or unforeseeable events requiring immediate attention. They can also be escalated from project components, typically relating to scope, cost, scheduling, dependencies external to programme or performance concerns that affect the overall programme. The Programme Manager (PgM), supported by the Programme Business Manager (PgBM) and Programme Support Team (PgST), is responsible for issue resolution, ensuring that emerging challenges are managed efficiently. The Issues Log is used to document and track all programme issues, assessing their urgency, impact, and interdependencies with risks, changes, or decisions. Critical decisions related to issue resolution are recorded in the Decision Log and, if necessary, escalated for higher-level intervention.

Manage Programme Change: Ensures that changes affecting the programme and its projects are systematically identified, assessed, and managed to maintain alignment with organisational strategy and programme objectives. Changes can arise from shifts in the programme environment, evolving strategic priorities, or modifications in scope, schedule, budget, or quality. The Programme Manager (PgM) leads change management efforts, supported by the Programme Owner (PgO) and Programme Business Manager (PgBM), while Project Managers (PMs) escalate significant project-level changes for consideration. Programme changes are documented in the Change Log, enabling structured assessment, decision-making, and tracking of their impact. By integrating change management throughout the programme lifecycle, this activity prevents unmanaged changes from increasing risks, costs, and inefficiencies.

Manage Programme Lessons: Focuses on capturing, assessing, and applying insights gained throughout the programme lifecycle to improve the programme as well as future initiatives. Lessons are identified at the programme level and can also originate from project components, enabling cross-project learning. The Programme Manager (PgM), supported by the Programme Support Team (PgST), leads this activity, ensuring that lessons are recorded in the Programme Lessons Log and used to drive continuous improvement. Lessons are captured at key milestones, such as Phase Gates, Stage reviews, or Programme-End Review Meetings, and can also be documented whenever learning opportunities arise. The process involves gathering stakeholder feedback, analysing challenges and successes, and formulating actionable recommendations to enhance programme management practices. Consolidated learnings are incorporated into the Programme-End Report during the Closing Phase.

Manage Programme Quality: Ensures that programme management processes and deliverables meet predefined quality standards through continuous quality assurance and control. This involves monitoring, reviewing, and improving programme activities to reduce defects, inefficiencies, and stakeholder dissatisfaction while maintaining alignment with organisational goals. Led by the Programme Manager (PgM) and supported by the Programme Support Team (PgST), quality management is integrated throughout the programme lifecycle, with formal assessments at key milestones and phase gates. The Programme Handbook defines quality standards, which are enforced through assurance activities that validate process conformity and control measures that assess output quality. Corrective actions are taken as needed to address deviations and improve performance.

The table below shows the allocation of the D-ARSCI responsibilities for the key Monitor & Control activities:

Monitor & Control Activities	AGB	PgSC	PgO	PgBM	PgM	PgST	PMs
Manage Programme Performance	I	A	I	S	R	S	C
Manage Stakeholders	I	A	I	S	R	S	C
Manage Programme Communications	I	D	A	S	R	S	C
Manage Programme Change	I	A	I	S	R	S	C
Manage Programme Risks	I	A	I	S	R	S	C
Manage Programme Issues	-	A	I	S	R	S	C
Manage Programme Quality	-	A	I	S	R	S	C
Manage Programme Lessons	I	A	S	S	R	S	S
Manage Integration and Transition	-	A	I	S	R	S	C
Manage Business Implementation	I	A	I	S	R	S	C

Table 4.1: The Responsibilities Assignment Matrix for the Monitor & Control Activities

Monitor & Control Artefacts

Monitor & Control Artefacts capture important information from the execution of the Monitor & Control activities and from their outputs. The purpose is to capture the monitoring information, document important controlling decisions, and provide relevant information that will facilitate communication with decision-makers and stakeholders.

Monitor & Control Artefacts should adhere to the quality standards of the programme and the organisation with regard to documentation, while fulfilling their purpose. The decision as to which artefacts are required to facilitate monitoring and controlling is made during the Planning Phase and documented in the Programme Handbook. This decision is based on the size, complexity and risk of the programme, the number of stakeholders, and the reporting expectations of the Programme Steering Committee (PgSC).

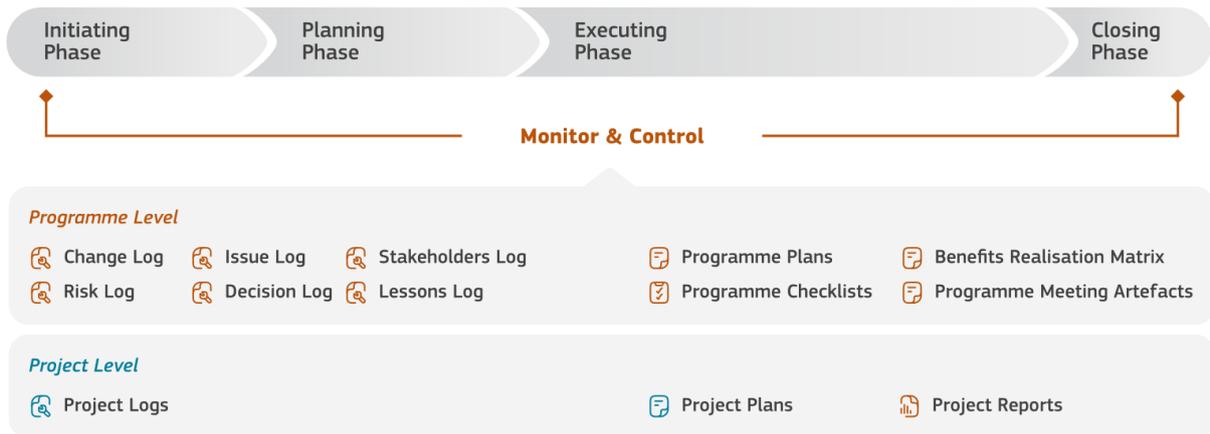


Fig. 4.3: Overview of the key PM²-PgM Monitor & Control Artefacts.

The table below shows the allocation of the D-ARSCI responsibilities for the key Monitor & Control Artefacts:

Monitor & Control Artefacts	AGB	PgSC	PgO	PgBM	PgM	PgST	PMs
Programme Meeting Artefacts	-	A	C	S	R	S	I
Programme Logs	-	I	I	C	A	R	S/C
Benefits Traceability Matrix	I	I	A	R	S	S	C
Programme Checklists	-	A	C	S	R	S	I

Table 4.2: The Responsibilities Assignment Matrix for the Monitor & Control Artefacts

Programme Logs: Represent essential tools for capturing and managing key programme-related events, including risks, issues, decisions, changes, stakeholder information, and lessons learned. They provide a centralised and standardised format to document events that require resolution or recording, offering insights for monitoring, controlling, and reporting. Established during the Initiating Phase, these logs enable early identification of risks and issues, documentation of decisions, and the recording of lessons for continuous improvement.

Benefits Traceability Matrix: The Benefits Traceability Matrix is a key programme management artefact used to define, document, and manage planned programme benefits. It provides a structured and standardised format for tracking benefits realisation and serves as an essential input into programme monitoring, control, and reporting. Established during the Initiating Phase, it is iteratively refined through the Planning and Executing Phases, aligned with the Programme Business Case, Programme Charter, and Programme Business Implementation Plan. The Programme Business Manager (PgBM) is responsible for its creation and maintenance, supported by the Programme Manager (PgM). Its tailored structure is documented in the Programme Business Implementation Plan.

Programme Checklists: Support the Programme Manager (PgM) in managing key programme dimensions by ensuring consistency, completeness, and compliance with governance and quality standards. They provide structured validation at critical points in the programme lifecycle. Examples of programme checklists include the Phase-Exit Review Checklist, Quality Review Checklist, Transition and Integration Checklist, Stakeholders Engagement Checklist, and Business Implementation Checklist.

5 Programme Governance - Description of Roles & Responsibilities

This section offers a brief description of each of the PM²-PgM Roles involved in the governance of a programme.

Programme Steering Committee (PgSC)

The Programme Steering Committee (PgSC) is a key governance body overseeing the programme, ensuring alignment with strategic objectives is maintained, and resolving major issues. It includes senior representatives from both the requesting and provider sides, ensuring balanced decision-making. It comprises the Programme Owner (PgO), the Programme Steering Business Manager (PgBM), and the Programme Manager (PgM), as well as other expert roles and representatives of the programme components, which participate as needed. The committee, chaired by the Programme Owner (PgO), approves key programme artefacts, addresses escalated risks and issues, and makes decisions on significant changes that impact the programme's scope, budget, or timeline.

Programme Owner (PgO)

The Programme Owner (PgO) is accountable for the overall success of the programme, ensuring that its objectives align with business priorities. As the key decision-maker, they chair the Programme Steering Committee (PgSC) and approve critical programme artefacts, including the Programme Business Case, Programme Charter, and Business Implementation Plan. The PgO provides strategic direction, mobilises resources, oversees business risks, and ensures organisational readiness for the programme's outcomes.

Programme Business Manager (PgBM)

The Programme Business Manager (PgBM) represents the Programme Owner (PgO) in daily programme operations, ensuring that the programme remains aligned with business needs. They work closely with the Programme Manager (PgM) in planning, coordination, and stakeholder engagement. The PgBM leads business reengineering and organisational change activities, ensuring that the organisation is ready to integrate the programme's results.

Programme Manager (PgM)

The Programme Manager (PgM) is responsible for managing the programme on a daily basis, delivering results within the agreed scope, time, cost, and quality constraints. They coordinate the Programme Core Team (PgCT), manage risks and issues, and escalate significant matters to the Programme Steering Committee (PgSC). The PgM oversees the creation of key management artefacts and ensures effective monitoring, reporting, and change management to keep the programme on track.

Business Implementation Group (BIG)

The (Programme) Business Implementation Group (BIG) comprises representatives from business and user groups. It is responsible for defining business requirements, conducting acceptance testing of programme deliverables, and ensuring the successful implementation of business changes necessary for integrating programme outputs into daily operations.

Programme Support Team (PgST)

The Programme Support Team (PgST) provides administrative, coordination, and logistical support to the Programme Manager (PgM), ensuring the smooth execution of programme management activities. It plays a key role in maintaining programme governance by supporting the development and maintenance of programme artefacts, such as the Programme Work Plan, Risk Log, Issue Log, and Reports. The PgST assists in scheduling and organising Programme Steering Committee (PgSC) meetings, tracking decisions, and ensuring that programme-level actions are followed up effectively.

Beyond administrative support, the Programme Support Team (PgST) plays a critical role in quality assurance, reporting, and knowledge management. It provides an advisory role on the use of methodology, procedures and tools within a programme to facilitate a common approach, standardisation, and ensure consolidation of monitoring data at the programme level. It consolidates information from project components, facilitating

programme monitoring and performance assessment. Additionally, it supports stakeholder engagement by ensuring that communication flows efficiently between the programme and its projects. The Programme Support Team (PgST) also assists in maintaining programme logs and documentation, ensuring artefacts are properly archived for future reference and organisational learning.

Project Managers (PMs)

Project Managers (PMs) are responsible for delivering a project within a programme while ensuring alignment with the programme's strategic objectives. Reporting to the Programme Manager (PgM), the Project Manager (PM) executes the project scope, manages resources, and coordinates stakeholders to ensure project deliverables support programme outcomes. They maintain key project artefacts, such as the Project Work Plan, Risk Log, and Change Log, ensuring that project-level risks, issues, and dependencies are escalated to the programme layer when necessary. The PM also provides regular status updates, contributing to programme reporting and supporting decision-making at the Programme Steering Committee (PgSC) level.

Beyond project execution, the Project Managers (PMs) play a role in Business Implementation and Transition, ensuring that project outputs integrate seamlessly into operations. While their primary focus is project delivery, they operate within the programme governance structure, ensuring their project contributes effectively to the programme's overarching goals. They are coordinated by the programme layer and collaborate with other project managers to align schedules and dependencies within the Programme Work Plan and participate in Programme Coordination Meetings to maintain consistency across all programme components.

6 Appendices

6.1 Appendix A – Acknowledgements & Contributions

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- CHLAPANI Angeliki, Head of Unit
- KAMINSKI Tomasz, Deputy Head of Unit
- MUSAT Bogdan, Head of Sector

Methodologies Office (MO):

- SEMERDZHIEVA Svetla, Team Lead
- KOUROUNAKIS Nicos, Methodology Expert
- BOCHAROVA Ksenia. Methodology Consultant
- LEFTER Diana-Mihaela, Methodology Consultant
- SUFARU Maria-Cristina, Methodology Consultant
- WHYE Gregory, Methodology Consultant
- PAOURIS Konstantinos, Graphic Design Consultant
- YOVKOVA Anina, Communications Consultant

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Document Author:	KOUROUNAKIS Nicos
PM ² -PgM Methodology Team:	KOUROUNAKIS Nicos, BOCHAROVA Ksenia, WHYE Greg, SUFARU Maria-Cristina
Contributors and Reviewers:	ANDREI Monica-Cristina, CHRISTODOULAKIS Konstantinos, DE VALCK Frederic, DUMITRESCU Anca-Elena, KATSAGOUNOS Ilias, KIPS Bert, LEFTER Diana-Mihaela, MICHELIOUDAKIS Elias, MINTOV Dimitar, PORTMANN Pierre-Olivier, VASILEIOU Charalampos
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6.2 Appendix B - The D-ARSCI Model of Responsibility Assignment

Responsibility is not an on/off concept. The D-ARSCI Model (pronounced dee-arskie) defines five (plus one) different degrees of responsibility. The highest degree of responsibility is 'Accountable' and the second highest 'Responsible', while the lower degrees of responsibility are 'Support', 'Consulted' and 'Informed'. The 'Decides' responsibility is used to denote Decision power (e.g. formal approvals).

Code	Responsibility	Summary Description
D	Decides	Decision-making authority
A	Accountable	Ultimately answerable for the success or failure of what they are accountable for.
R	Responsible	Does the work. Others can be asked to assist in a supporting role.
S	Supports	As part of a team, supports the completion of the activity or artefact.
C	Consulted	Provides information/insights.
I	Informed	Kept informed of the progress and the end-result.

The Role with the Decide responsibility (D-ARSCI:**D**) is the decision-making authority. This decision can be related to the approval (or rejection) of the results of a given management activity or artefact. Decisions for moving past a Phase Gate are typically areas in which the Decide (D-ARSCI:**D**) Responsibility is applied. When there is no explicit assignment of the Decide responsibility (D-ARSCI:**D**), the implication is that no formal approval is necessary. There is always a single Role that has the Decide responsibility.

The Role that is Accountable (D-ARSCI:**A**) is ultimately answerable for the success or failure of what they are accountable for. To ensure this success, they need to provide the resources, leadership and support that will enable everyone else to perform their own responsibilities. Note that the Role that is Accountable accepts the results of an activity, which also implies (informal) approval. There is always a single role D-ARSCI:**A** for any given management activity or artefact.

The Role that is Responsible (D-ARSCI:**R**) is responsible for doing the work (e.g. creating an artefact). Often, others may also be responsible for doing work, when they have the Support responsibility, for instance, or when work is delegated to them. However, it should be clear that only work can be fully delegated and not the responsibility itself, as in such cases the delegator becomes Accountable for the performance of the delegee. Note that, as with Accountability, in PM²-PM there is always a single role D-ARSCI:**R** for any given management activity or artefact.

As part of a team, Roles with the Supports (D-ARSCI:**S**) responsibility also work with the person Responsible to complete the given management activity or artefact. There is no restriction to how many people can be D-ARSCI:**S**.

As part of a team, Roles with the Consulted (D-ARSCI:**C**) responsibility need to provide information or insights to the person Responsible, so they can complete a given management activity or artefact. The Consulted responsibility is not simply a right, it is also an obligation. There is no restriction to how many roles can be ARSCI:**S**.

Finally, those Roles with the Informed (D-ARSCI:**I**) responsibility need to be kept informed of the progress or/and the end-result of the activity or artefact. As with the Consulted responsibility, the Informed responsibility is not simply a right; it also carries the obligation to remain informed. There is no restriction to how many roles can be D-ARSCI:**I**.

Consolidated PM²-PgM RAM (Responsibilities Assignment Matrix)

Initiating Phase	AGB	PgSC	PgO	PgBM	PgM	PgST	PMs
Initiating Kick-off Meeting	-	-	A	S	R	S	C
Programme Initiation Request	-	-	A	S	R	S	C
Programme Business Case	D	C	A	S	R	S	C

¹ The ARSCI model is the same as the RASCI model. The reordering of the R and A is done to correctly reflect the order of the level of responsibility, from A the highest to I the lowest.

Programme Charter	D	A	S	S	R	S	C
Programme Logs (created)	I	I	I	C	A	R	S/C
RfP Phase Gate Assessment	I	A	C	S	R	S	I
RfP Phase Gate Approval	D	A	R	S	S	S	I

Planning Phase	AGB	PgSC	PgO	PgBM	PgM	PgST	PMs
Planning Kick-Off Meeting	-	A	I	S	R	S	C
Programme Handbook	-	A	I	C	S	R	I
Programme Communications Plan	-	A	C	S	R	S	C
Programme Integration & Transition Plan	-	A	C	S	R	S	C
Programme Business Implementation Plan	-	A	C	R	S	S	S
Programme Work Plan	D	A	I	C	R	S	I
RfE Phase Gate Assessment	I	A	C	S	R	S	I
RfE Phase Gate Approval	D	A	R	S	S	S	I

Executing Phase	AGB	PgSC	PgO	PgBM	PgM	PgST	PMs
Executing Phase Kick-off Meeting	-	A	S	S	R	S	C
Programme Coordination	-	A	S	S	R	S	C
Programme Stages Management	I	C	A	S	R	S	C
Programme Reports	I	A	I	C	R	S	I
RfC Phase Gate Assessment	I	A	C	S	R	S	S
RfC Phase Gate Approval	D	A	R	S	S	S	I

Closing Phase	AGB	PgSC	PgO	PgBM	PgM	PgST	PMs
Programme-End Review Meeting	-	A	C	S	R	S	C
Programme-End Report	I	A	C	S	R	S	C
Business Implementation Handover	I	A	S	R	S	S	C
Administrative Closure	I	A	C	S	R	S	C
Programme Closure Approval (END-Gate)	D	A	R	S	S	S	I
Programme Closure Note	I	A	C	S	R	S	I

Monitor & Control Activities	AGB	PgSC	PgO	PgBM	PgM	PgST	PMs
Manage Stakeholders	I	A	I	S	R	S	C
Manage Programme Change	I	A	I	S	R	S	C
Manage Programme Risks	I	A	I	S	R	S	C
Manage Programme Issues	-	A	I	S	R	S	C
Manage Programme Quality	-	A	I	S	R	S	C
Manage Programme Lessons	I	A	S	S	R	S	S
Manage Programme Approvals	I	D	A	S	R	S	C
Manage Integration and Transition	-	A	I	S	R	S	C
Manage Business Implementation	I	A	I	S	R	S	C
Monitor Programme Performance	I	A	I	S	R	S	C
Control Programme Performance	-	A	D	S	R	S	C

Monitor & Control Activities	AGB	PgSC	PgO	PgBM	PgM	PgST	PMs
Programme Meeting Artefacts	-	A	C	S	R	S	I
Programme Logs	-	I	I	C	A	R	S/C
Benefits Traceability Matrix	I	I	A	R	S	S	C
Programme Checklists	-	A	C	S	R	S	I

6.3 Appendix C - Glossary of Key Terms

This glossary defines key terms used in PM²-PgM, including general programme management terminology and selected PM²-specific terms. It is not exhaustive. For a more detailed understanding of PM² terminology, consult the relevant appendix of the latest official PM² Guide – Project Management Methodology, available from the Publications Office of the European Union and at <https://pm2.europa.eu>.

Term	Definition
Appropriate Governance Body (AGB)	The highest decision-making authority responsible for approving programme goals, budget, initiation, and closure.
Benefits	The measurable improvements or positive outcomes resulting from the programme, aligned with strategic objectives.
Benefits Realisation	The process of ensuring that the planned benefits of the programme are achieved and sustained post-programme.
Benefits Traceability Matrix	A programme artefact that documents and tracks programme benefits throughout its lifecycle.
Business Implementation	The process of ensuring that the programme's outputs are effectively integrated into business operations.
Business Implementation Group (BIG)	A group of business representatives working with the Programme Business Manager (PgBM) and project representatives for achieving the programme outcomes and benefits.
Business Implementation Handover	The formal transfer of responsibility for implementing remaining business implementation activities to operational owners.
Business Implementation Plan	A document outlining activities to manage organisational changes resulting from the programme.
Change Log	A record of all programme changes, including their source, impact, approval status, and implementation progress.
Closing Phase	The final programme phase where formal closure activities, lessons learned, and administrative archiving take place.
Continuous Improvement	The practice of refining programme processes and outputs based on lessons learned and feedback.
Decision Log	A documented record of key decisions made throughout the programme to ensure traceability and accountability.
End-Gate (Programme Closure)	The final governance checkpoint that formally approves the programme's closure.
Governance	The framework that defines decision-making authority, roles, and responsibilities in programme management.
Key Performance Indicators (KPIs)	Metrics used to measure the effectiveness of programme execution and benefits realisation.
Lessons Log	Insights gained from programme execution, documented to improve future programme management practices.
Management Sponsorship	The formal support and commitment provided by senior management to authorise and champion the programme, ensuring strategic alignment and resource availability.
Monitor & Control	The process of tracking programme performance, managing risks and issues, and implementing corrective actions.
Outcomes	The intermediate results of a programme that lead to achieving the intended benefits.
Outputs	The tangible deliverables produced by projects or other components.
Phase Gate	A structured review at the end of each programme phase to determine readiness for the next phase.

Portfolio Management	The coordinated management of multiple programmes and projects to align with strategic objectives.
Programme	A temporary structure that groups interrelated projects and activities to achieve strategic goals. A programme yields more benefits by cross-coordination among the projects than by individual projects achieving their individual objectives in isolation. It is the principle that the value created through a programme is greater than the sum-value of individual parts that needs to be considered when setting up a programme
Programme Business Case	A justification document that links programme objectives to organisational strategy and expected benefits.
Programme Business Manager (PgBM)	The role responsible for managing business implementation and tracking benefits realisation.
Programme Components	The constituent parts of a programme, typically including projects and other initiatives coordinated to achieve the programme objectives.
Programme Charter	A document defining programme objectives, scope, governance, and high-level plans.
Programme Dashboard	A visual representation of key programme performance indicators and status updates.
Programme Handbook	A document detailing the programme's management approach, governance, and artefacts.
Programme Logs	A set of records tracking risks, issues, decisions, changes, and lessons learned.
Programme Manager (PgM)	The role responsible for coordinating programme execution and achieving its goals.
Programme Owner (PgO)	The senior manager accountable for the programme's success and alignment with strategy.
Programme Results	The combined outcomes, outputs, and benefits produced by the programme.
Programme Roadmap	A high-level visual timeline that outlines key milestones and deliverables of the programme.
Programme Steering Committee (PgSC)	A governance body responsible for guiding and supporting programme execution.
Programme Team	All roles involved in programme and programme management activities, including project-level representatives.
Programme Transition & Integration Plan	A document detailing how programme outputs will be incorporated into the organisation.
Project Manager (PM)	The person responsible for managing a specific project within the programme.
Quality Management	The processes and activities that ensure programme deliverables meet predefined standards.
Return on Investment (ROI)	A financial metric assessing the profitability and value of a programme investment.
Risk Log	A document tracking identified programme risks, their assessment, and mitigation actions.
Stakeholder Engagement	The process of involving and managing stakeholders throughout the programme lifecycle.
Stakeholders Log	A record of all programme stakeholders, their interests, and engagement strategies.
Strategic Alignment	Ensuring that the programme remains aligned with the organisation's long-term objectives.
Value	The total worth derived from the programme, including financial, operational, and strategic benefits.

6.4 Appendix D – Key Programme Management Concepts and Techniques

This section presents a curated list of tools and techniques commonly used in programme management. These methods support strategic planning, performance monitoring, stakeholder engagement, benefits management, and decision-making across the programme lifecycle. While each technique is briefly described here, more comprehensive guidance and practical applications can be found in widely available public references. Programme Managers are encouraged to select and use these techniques based on the specific needs, complexity, and context of their programmes.

Concepts & Techniques	Short Description
ADKAR Model	Change management framework addressing Awareness, Desire, Knowledge, Ability, and Reinforcement for successful transitions.
Benefit-Cost Ratio (BCR)	Ratio of the present value of benefits to costs, indicating economic efficiency of a programme.
Benefits Tracking	Monitors the realisation of expected programme benefits over time through planned metrics and periodic reviews.
Comparative Analysis	Measures programme impact by comparing outcomes before and after intervention across groups or periods.
Correlation Analysis	Examines relationships between variables to uncover associations that may affect programme outcomes.
Cost-Benefit Analysis	Assesses financial viability by comparing projected benefits and costs, often using ROI, NPV, or IRR calculations.
Counterfactual Analysis	Estimates programme impact by comparing results with a control group representing the non-intervention scenario.
Effective Communication	Ensures accurate, timely, and structured information flow among stakeholders to support decision-making and engagement.
Effort and Cost Estimates	Forecasts work and financial requirements to support budgeting, scheduling, and performance tracking.
Gantt Charts	Visual scheduling tool that maps tasks over time, illustrating dependencies, progress, and critical paths.
Gap Analysis	Compares the current and desired future states of a programme to identify performance gaps and improvement areas.
Key Performance Indicators (KPIs)	Quantitative metrics used to monitor programme performance, guide decision-making, and ensure strategic alignment.
Logic Models	Visual frameworks mapping inputs, activities, outputs, and outcomes to clarify how benefits are achieved.
Longitudinal Analysis	Tracks performance data over time to assess trends, sustained impacts, and delayed effects.
Net Present Value (NPV)	Calculates the difference between discounted cash inflows and outflows to evaluate a programme's financial viability.
Optimism Bias	The tendency to underestimate costs and overestimate benefits, requiring adjustments for realistic planning.
Outcome Mapping	Tracks behavioural changes in target groups to assess a programme's influence on stakeholders.
PESTEL Analysis	Analyses external macro-environmental factors: "Political, Economic, Social, Technological, Environmental, and Legal" to guide strategic alignment and risk anticipation.
Programme Dashboards	Real-time visual tools that aggregate and display programme performance data for informed decision-making.
Programme Roadmaps	Provides a high-level visual overview of objectives, milestones, and timelines to align stakeholder expectations.
Programme Stage Plans	Detailed plans for each execution stage, including deliverables, risks, and timelines, to support phased delivery.

Concepts & Techniques	Short Description
Qualitative Analysis	Interprets non-numeric data to gain insights into stakeholder experiences and contextual programme effects.
Return on Investment (ROI)	Compares net benefits to total costs to measure programme efficiency and profitability.
Running Effective Meetings	Focuses on clear objectives, structured agendas, and actionable outcomes to enhance collaboration and accountability.
Sensitivity Analysis	Evaluates how changes in key assumptions impact outcomes to support risk management and planning.
Stakeholder Behaviour-Influence Matrix	Classifies stakeholders by influence and behaviour to prioritise engagement and mitigate resistance.
SWOT Analysis	Identifies a programme's internal strengths and weaknesses, and external opportunities and threats to support strategic planning and risk mitigation.
Theory of Change	Defines the sequence of changes required to achieve long-term outcomes, linking activities to impacts.
Work Breakdown Structure (WBS)	Decomposes work into manageable components to support planning, resource allocation, and progress tracking.



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Contact us:

ec-pm2@ec.europa.eu

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