# Course Agenda

- Introduction & context

- Projects and project management

- PM² in a nutshell

- PM² Governance model

- PM² Artefacts

- PM² Mindsets

- PM² Project lifecycle

- Portfolio management

The PM² Offering enables **Organisations** to implement their Projects in a increasingly **effective** and **efficient** manner.

The PM² Methodology enables **project teams** to do "better" project management and deliver **solutions and benefits** to their Organisations & Stakeholders.
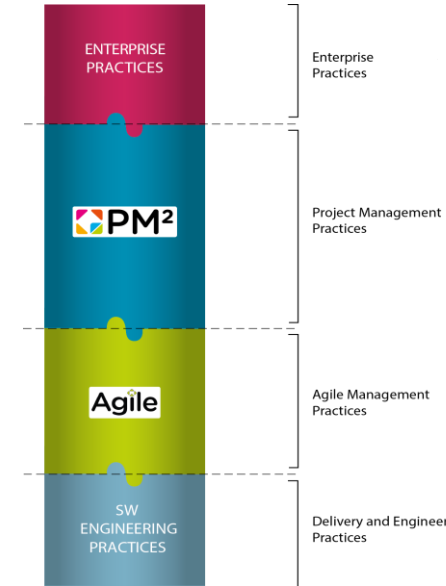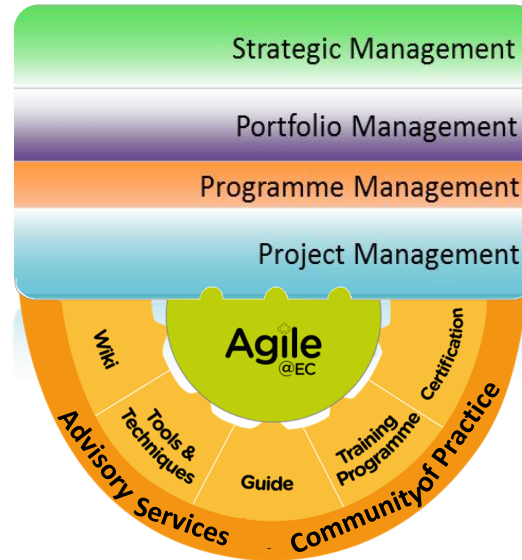
**During project initiation:**

- Lack of link between business strategy and project
- Unclear objectives, competing/conflicting objectives
- Little or no alignment among major stakeholders
- Inappropriate decision making
- Unclear Project Charter
- Lack of executive support & user involvement

**During project planning & execution:**
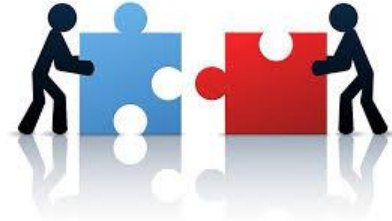
- Poor or no requirements
- Misunderstanding requirements
- Lack of customer involvement
- Poor planning: unrealistic timescales
- Scope creep: no change control
- Unrealistic effort/resource estimates
- Inappropriate skills
- Lack of communication
- Inadequate risk management
- Lack of clarity on performance and control metrics
- Inconsistent approaches and lack of PM training

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

| Temporary 🕐 | Unique ❶ | Output ➡ | Constraints |
|:---:|:---:|:---:|:---:|
| Start & End | Non routine | Product or Service | Time, Cost, Quality... |
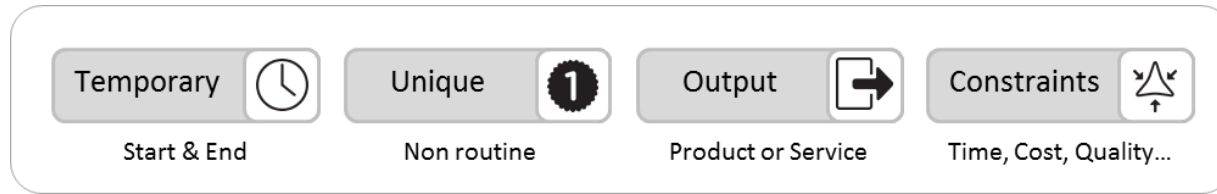
- Project deliverables are merely a means to an end.
- The real purpose of a project is to achieve certain outcomes.

| Project | » | Outputs | → | Outcomes | → | Benefits |

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

**PM² Project**

Business Aspect | Development Aspect

Effective Delivery of Solutions & Benefits

Control & Agility

PM² Mindsets

GOVERNANCE

LIFECYCLE

PROCESSES

ARTEFACTS

The PM² Methodology Guide

Project Management Best Practices
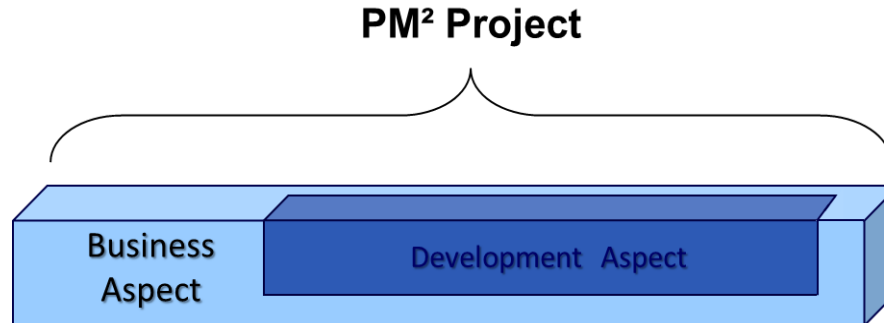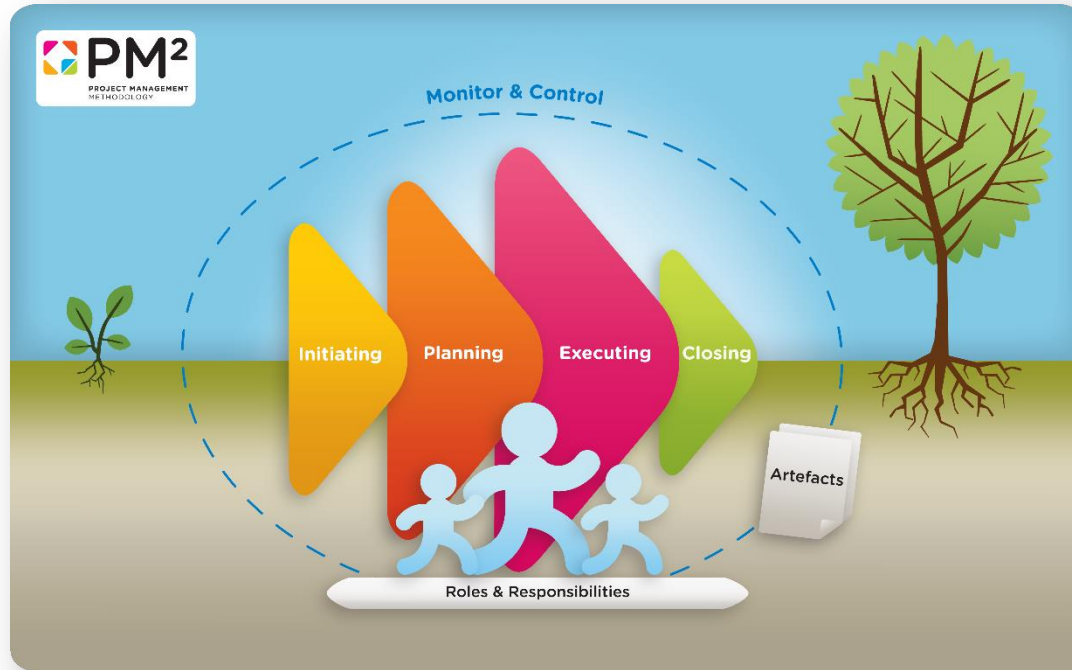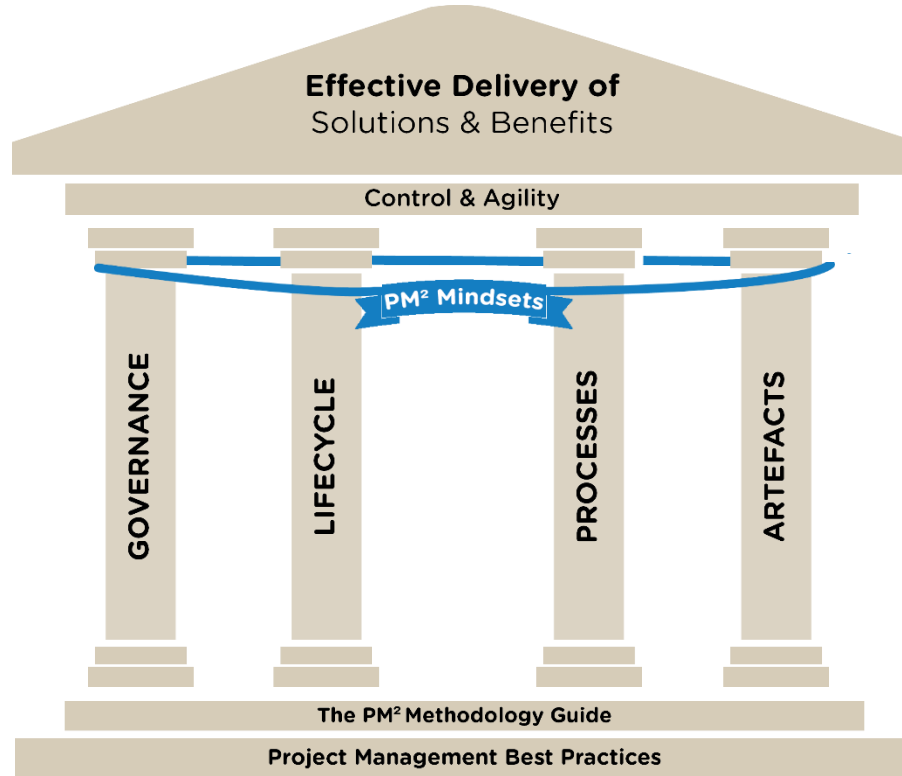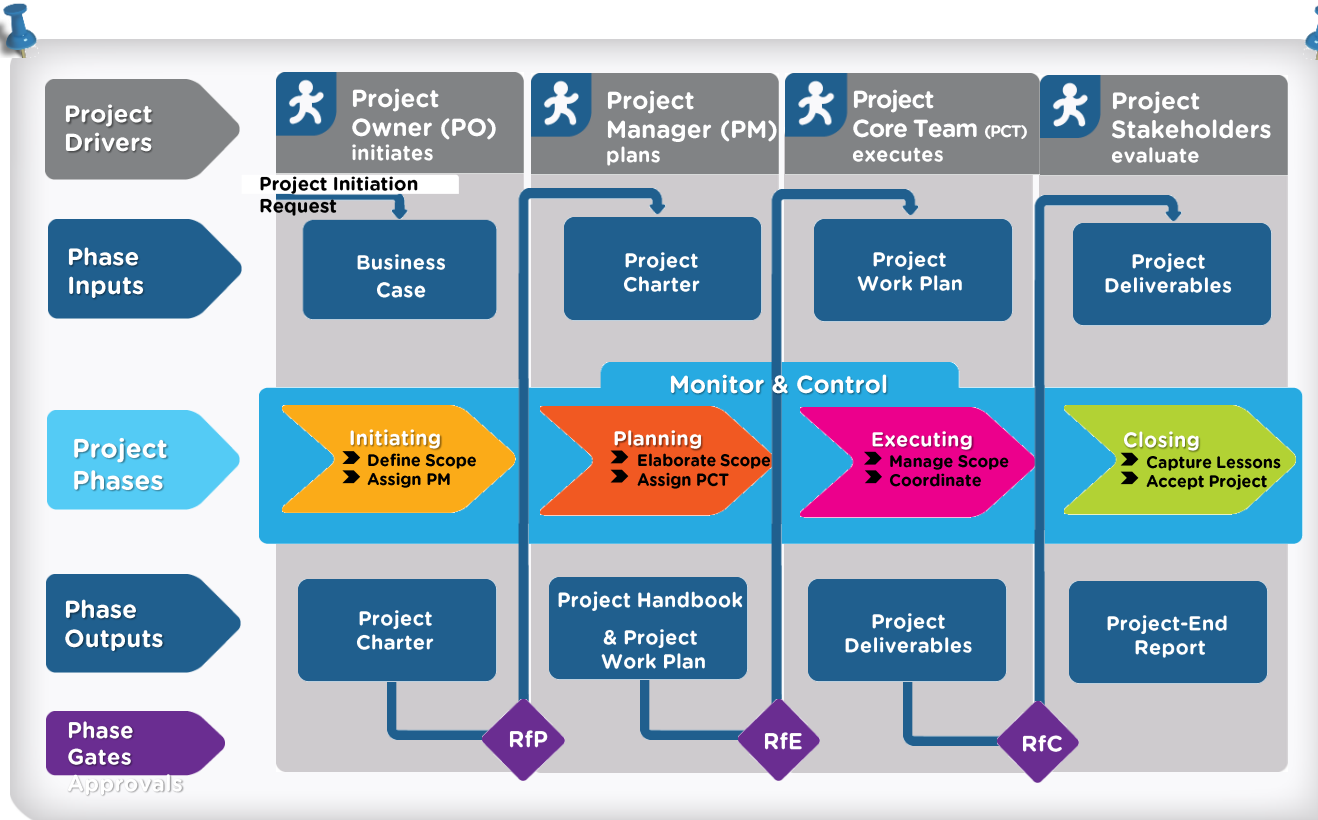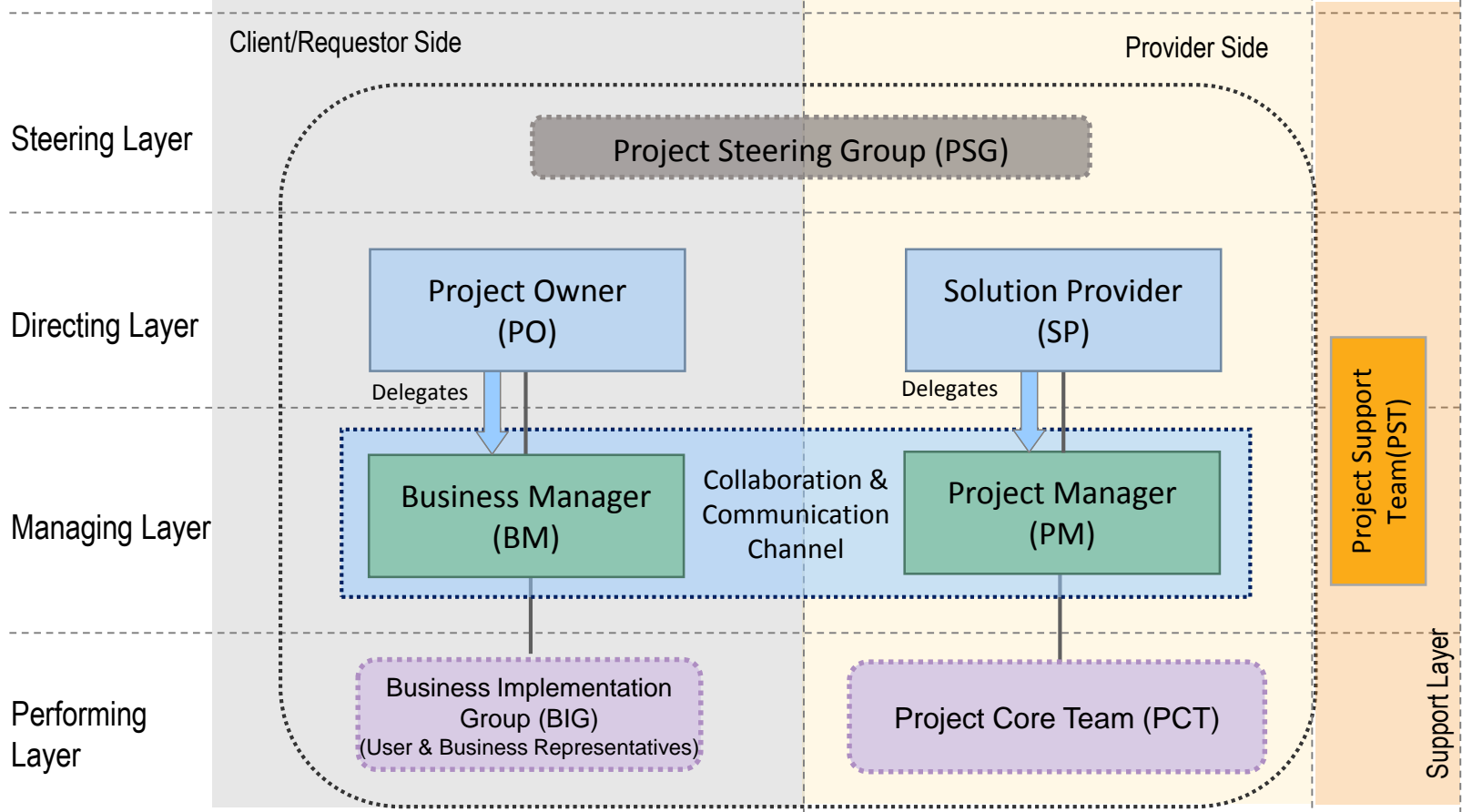
- Understands the business – have access to people that understand the business

- Is capable of defending/expressing the interests of the organisation

- Has access to the Project Owner (PO) and a good line of communication

- Acts on a daily basis on behalf of the Project Owner (PO)

- Manages the business implementation activities and coordinates the User Representatives

- Leads the implementation of the business changes as defined by the project

- Ensures that the organisation is ready to absorb the change and use the final project deliverables

- Ensures that the Project outputs produce the expected results (outcomes and benefits)

- Cares about the outcome(s) of the project and "feels the pain" of bad project deliverables

# PM² Project Governance

PM² Responsibilities: RASCI
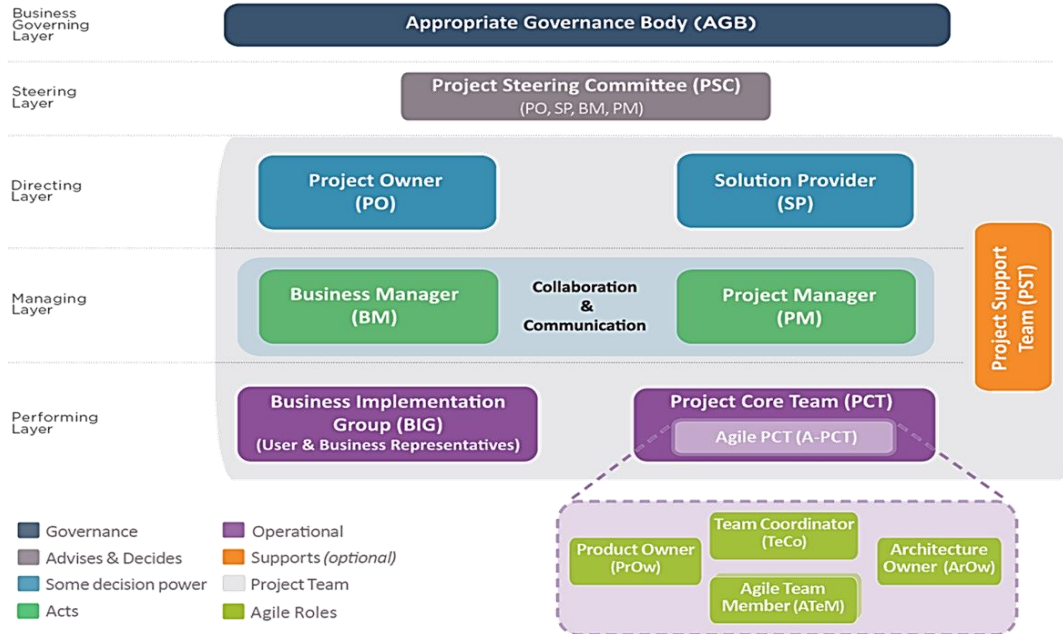
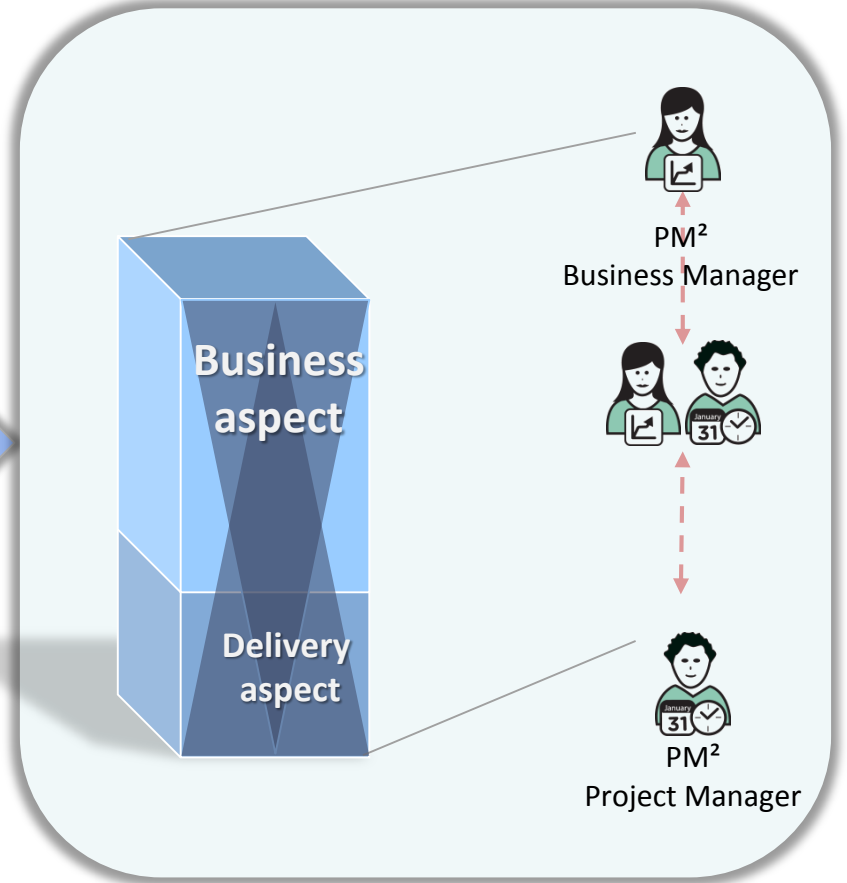| Initiating | AGB | PSC | PO | BM | UR | SP | PM | PCT |
|---|---|---|---|---|---|---|---|---|
| Project Initiation Request | I | n.a. | A/S | R | S/C | I | n.a. | n.a. |
| Business Case | I | C | A | R | C | S | S | n.a. |
| Project Charter | I | C | A | S | C | S | R | C |
| **Planning** | **AGB** | **PSC** | **PO** | **BM** | **UR** | **SP** | **PM** | **PCT** |
| Planning Kick-off Meeting | I | A | C | S | C | C | R | C |
| Project Handbook | I | I | A | S | C | I | R | C |
| Project Stakeholder Matrix | I | I | A | S | C | I | R | C |
| Project Work Plan | I | A | C | S/C | C | C | R | S/C |
| Outsourcing Plan | A | C | C | C | I | S | R | I |
| Deliverables Acceptance Plan | I | A | C | S | I | C | R | C |
| Transition Plan | I | A | C | C | C | C | R | C |
| Business Implementation Plan | I | I | A | R | C | I | S | I |
| Management Plans | | | | | | | | |
| Requirements Management Plan | I | I | A | C | C | I | R | S |
| Project Change Management Plan | I | I | A | C | C | I | R | I |
| Risk Management Plan | I | C | A | C | I | I | R | C |
| Issue Management Plan | I | I | A | C | C | I | R | C |
| Quality Management Plan | I | A | C | C | C | C | R | C |
| Communications Management Plan | I | I | A | S | C | I | R | C |
| **Executing** | **AGB** | **PSC** | **PO** | **BM** | **UR** | **SP** | **PM** | **PCT** |
| Executing Kick-off Meeting | I | A | C | S/C | C | C | R | C |
| Project Coordination | I | I | A | S | C | I | R | I |
| Quality Assurance | I | I | I | S | C | I | R | A |
| Project Reporting | I | I | A | S/C | I/C | I/C | R | C |
| Information Distribution | I | I | A | C | I | I | R | C |
| **Monitor & Control** | **AGB** | **PSC** | **PO** | **BM** | **UR** | **SP** | **PM** | **PCT** |
| Monitor Project Performance | I | I | A | C | C | I | R | C |
| Control Schedule | I | I | A | C | C | I | R | C |
| Control Cost | I | I | A | C | C | I | R | C |
| Manage Stakeholders | I | I | A | S/C | I | C | R | I |
| Manage Requirements | I | I | A | C | C | I | R | S |
| Manage Project Changes | I | C | A | S | I | I | R | C |
| Manage Risks | I | C | A | S/C | C | I | R | C |
| Manage Issues & Decisions | I | I | A | S | C | I | R | C |
| Manage Quality | I | I | I | S/C | C | A | R | C |
| Manage Deliverables Acceptance | I | I | A | S | C | C | R | C |
| Manage Business Implementation | I | I | A | R | C | I | S | I |
| Manage Transition | I | A | C | C | C | C | R | C |
| Manage Outsourcing | A | C | C | C | I | S | R | I |
| **Closing** | **AGB** | **PSC** | **PO** | **BM** | **UR** | **SP** | **PM** | **PCT** |
| Project-End Review Meeting | I | A | C | S | C | C | R | C |
| Project-End Report | I | C | A | S | C | C | R | C |
| Administrative Closure | I | C | A | C | I | C | R | C |

Pure Project Perspective
*(work-centric)*

Holistic View
*(value centric)*

Business aspect

Delivery aspect

Project Manager

Business aspect

Delivery aspect

PM² Business Manager

PM² Project Manager

# PM² Tailoring



**CoEPM²**
European Commission

## Activities

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

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

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

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

## Artefacts

### Initiating
- ☐ Project Initiation Request
- ☐ Business Case
- ☐ Project Charter
- ☐ Project Logs (setup).

### Planning
- ☐ Planning Kick-off/ MoM
- ☐ Project Handbook
  - Roles & responsibilities
  - Management plans
- ☐ Project Stakeholder Matrix
- ☐ Outsourcing Plan
- ☐ Project Work Plan
- ☐ Deliverables Acceptance Plan
- ☐ Transition Plan
- ☐ Business Implementation Plan

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

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

**RfP** Ready for Planning

**RfE** Ready for Executing

**RfC** Ready for Closing

## Monitor & Control

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

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

### Artefacts

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

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

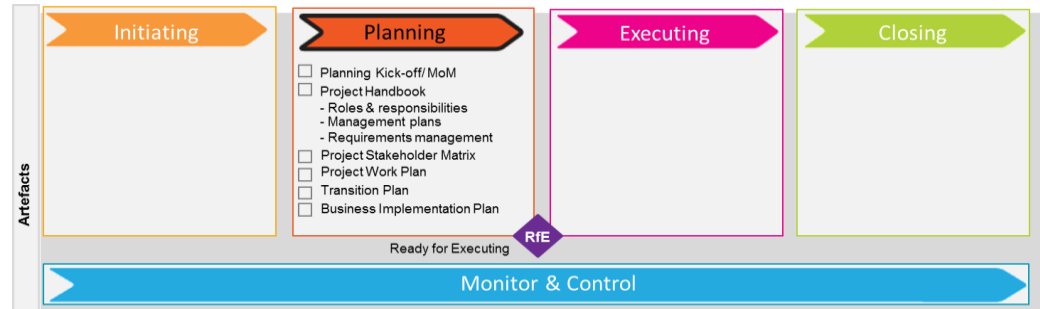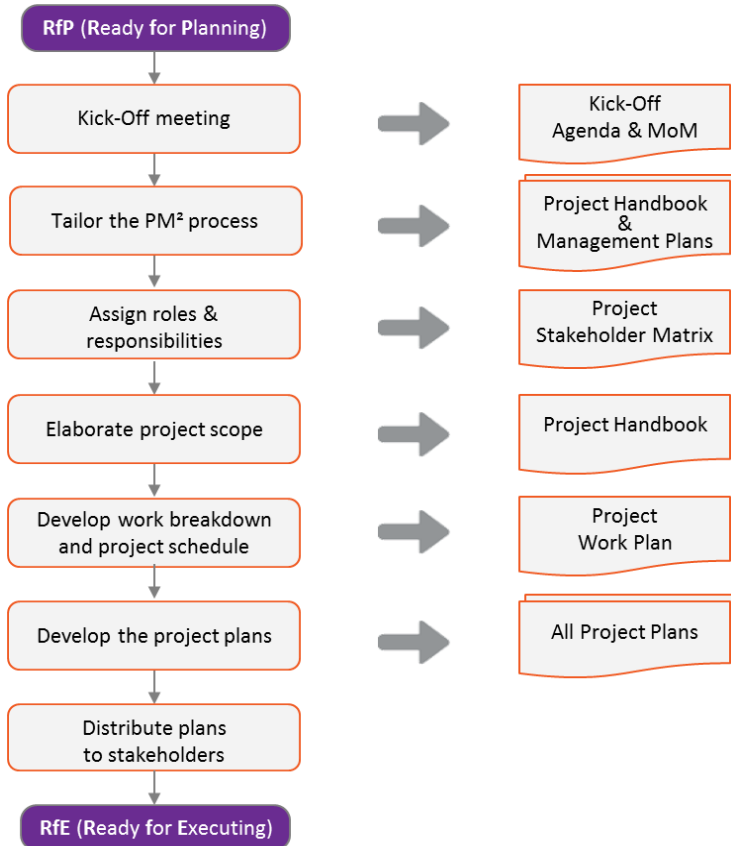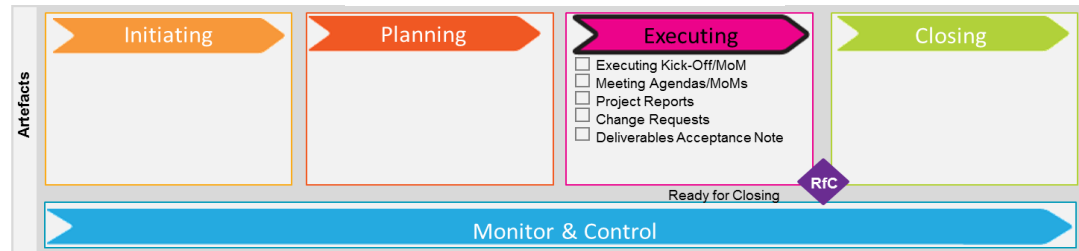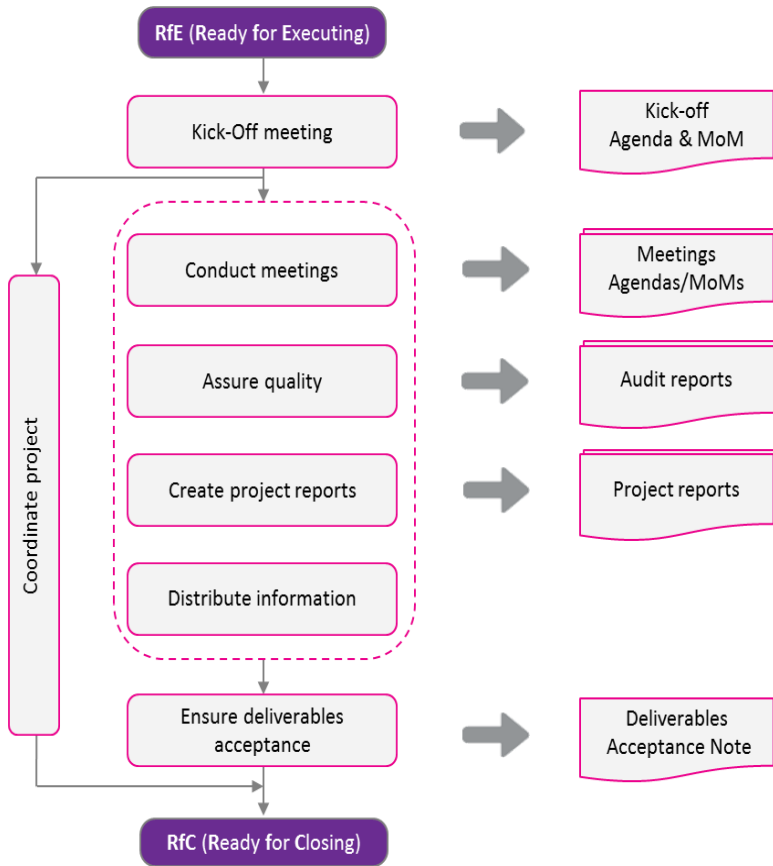| Contextual Competences | Behavioural Competences |
|---|---|
| • Project Orientation<br>• Programme Orientation<br>• Portfolio Orientation<br>• Strategy Implementation<br>• Permanent Organisation<br>• Personnel Management<br>• Business Systems<br>• Products & Technology<br>• Security<br>• Safety & Environment<br>• Finance<br>• Legal<br><br>*Source: IPMA-ICB* | • Leadership<br>• Engagement & Motivation<br>• Self-Control<br>• Assertiveness<br>• Relaxation<br>• Openness, Creativity<br>• Results orientation<br>• Efficiency<br>• Consultation<br>• Negotiation<br>• Managing Conflict & Crisis<br>• Reliability<br>• Values appreciation and Ethics |

1. **Apply PM²** best practices to manage projects

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

3. Become **committed** to delivering project results with maximum **value** rather than <u>just</u> following plans

4. Foster a project culture of clear **communication** and effective **collaboration**

5. **Involve** project stakeholders in the organizational change needed to maximize project **benefits**

6. **Invest** in developing those competences required to **become better** project contributors

7. **Share knowledge** and lessons learned, and contribute to the **improvement** of project management at EC

8. Are **inspired** by the PM² Guidelines on Professional Conduct.

**RfP (Ready for Planning)**

| Process Step | Artefact |
|---|---|
| Kick-Off meeting | → Kick-Off Agenda & MoM |
| Tailor the PM² process | → Project Handbook & Management Plans |
| Assign roles & responsibilities | → Project Stakeholder Matrix |
| Elaborate project scope | → Project Handbook |
| Develop work breakdown and project schedule | → Project Work Plan |
| Develop the project plans | → All Project Plans |
| Distribute plans to stakeholders | |

**RfE (Ready for Executing)**

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

Artefacts

Ready for Executing — **RfE**

Monitor & Control

An overview: Executing Phase

RfE (Ready for Executing)

Kick-Off meeting → Kick-off Agenda & MoM

Conduct meetings → Meetings Agendas/MoMs

Assure quality → Audit reports

Create project reports → Project reports

Distribute information

Coordinate project

Ensure deliverables acceptance → Deliverables Acceptance Note

RfC (Ready for Closing)

Artefacts

Initiating | Planning | Executing | Closing

Executing Kick-Off/MoM
Meeting Agendas/MoMs
Project Reports
Change Requests
Deliverables Acceptance Note

Ready for Closing

RfC

Monitor & Control

| Initiating | Planning | Executing | Closing |
|---|---|---|---|

## Monitor & Control

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

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

**Artefacts**

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

**Checklists**
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- ☐ Business Implementation Checklist
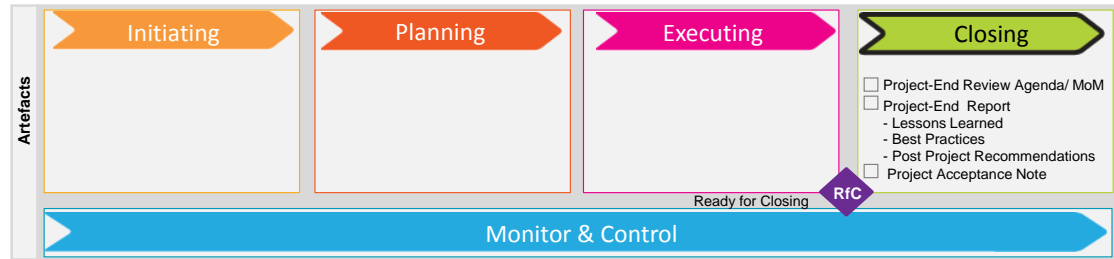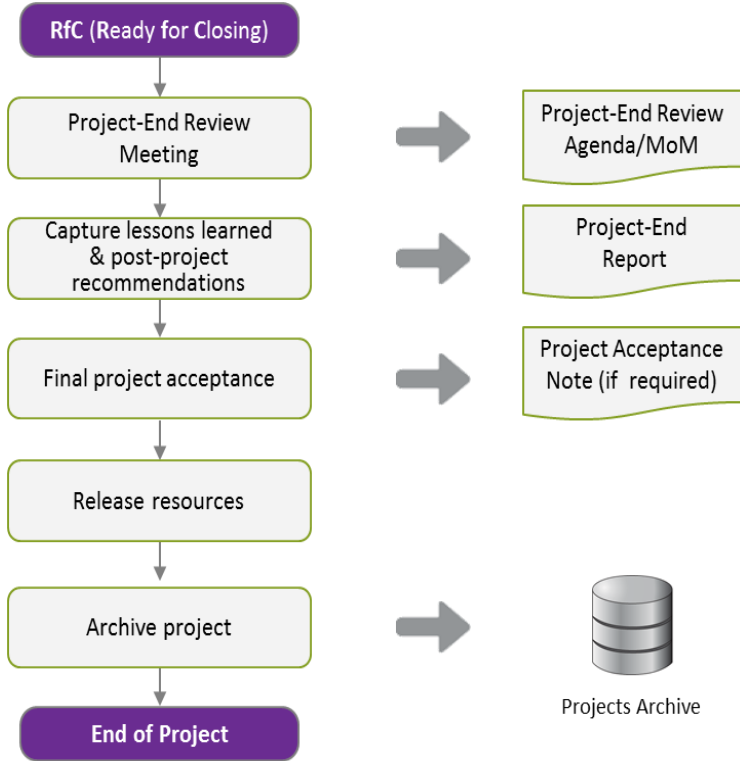
- Agile PM²
- Programme management
- Portfolio management

The PPP Tree
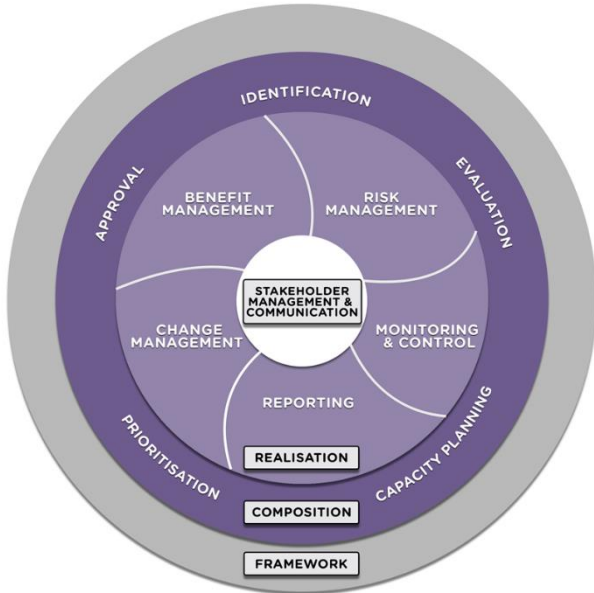
**Strategic Management**

Strategic Plan

**Portfolio Management**

Corporate Portfolio

Portfolio

Portfolio

**Programme Management**

Programme

Programme

Programme

**Project Management**

Projects
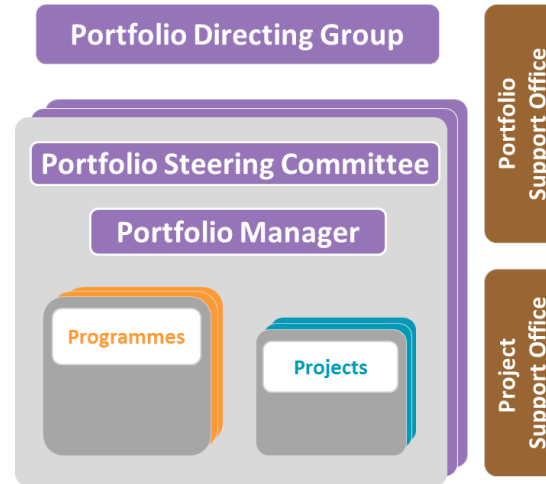
Projects

Projects

Projects

Projects

Other Work

Other Work

# The PM²-PPM Overview
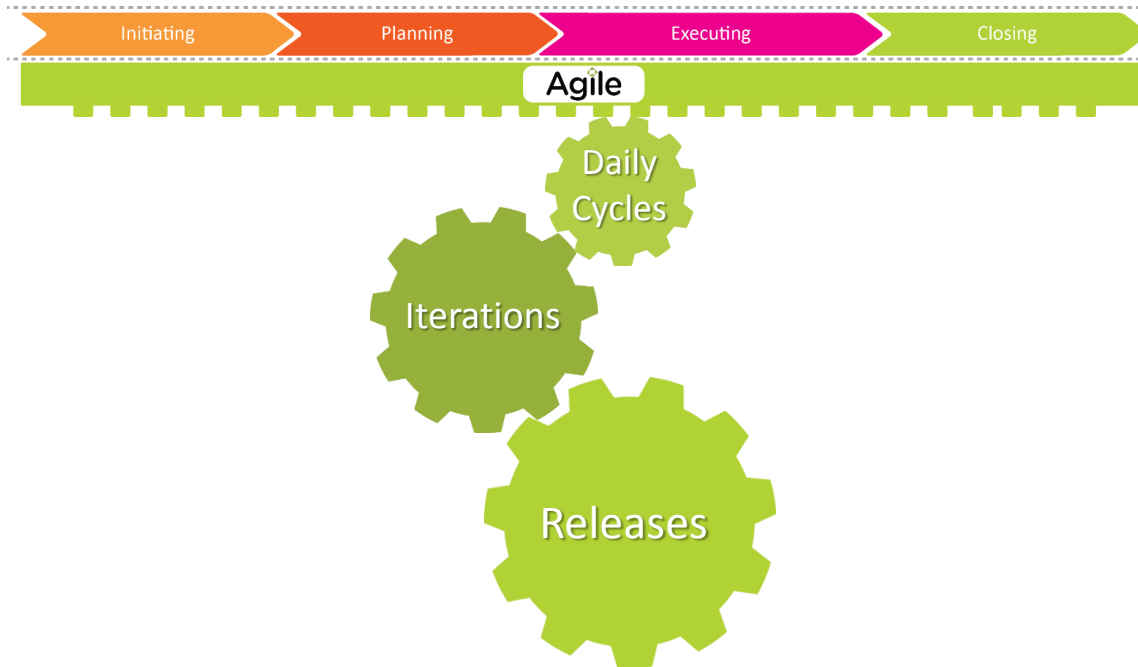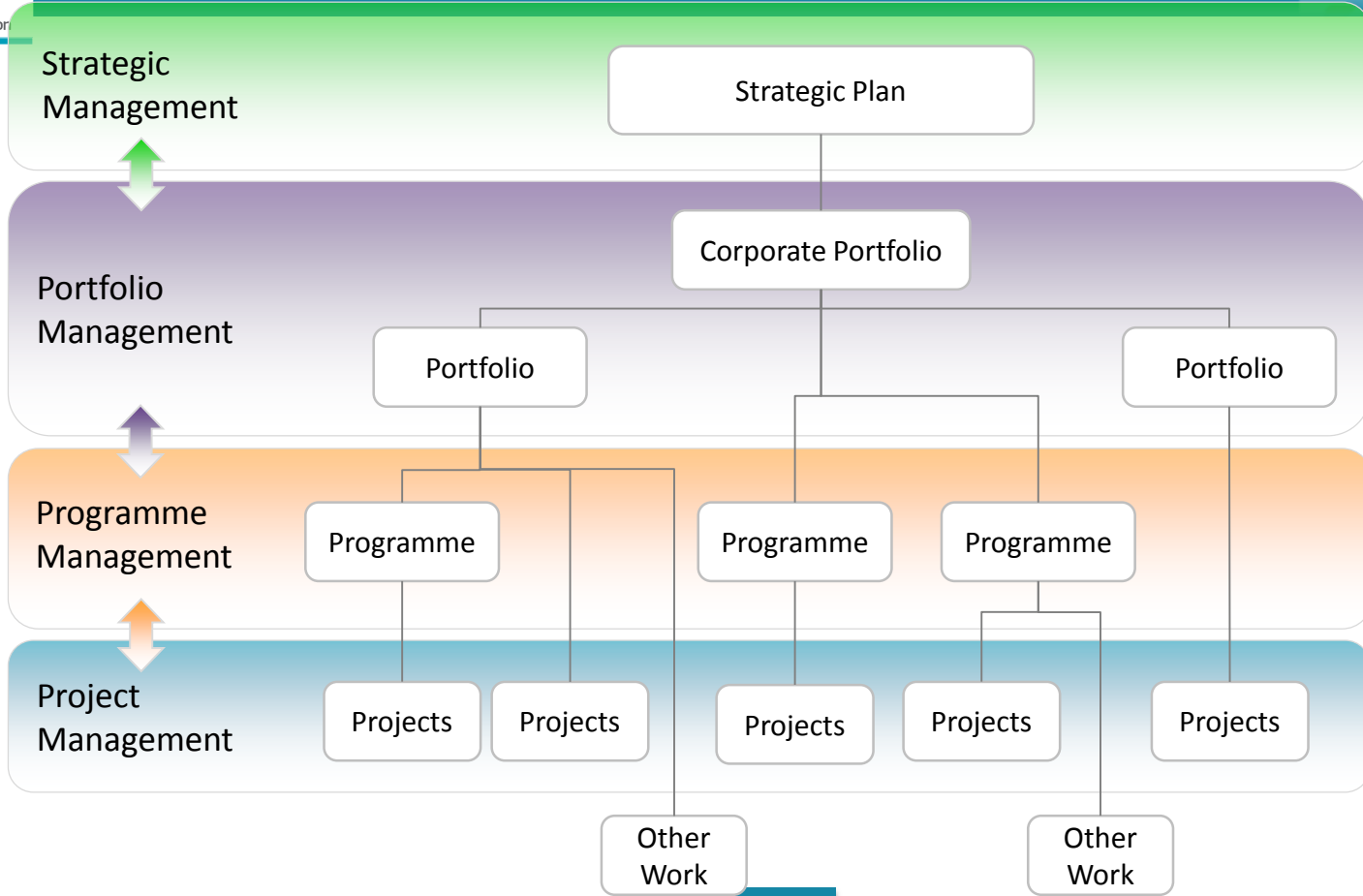
## Processes

## Governance

## Artefacts
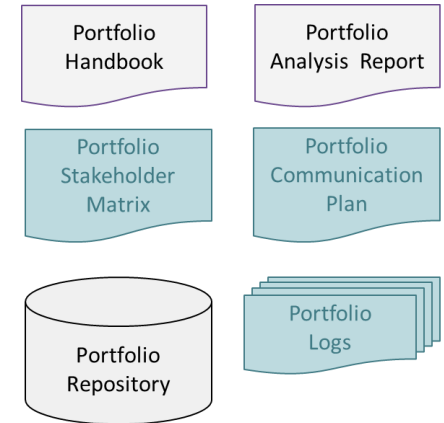
- PM²-PPM Guide

- PM²-PPM Wiki

- PM²-PPM Artefacts

- PM²-PPM Tools & Techniques

- Catalogue Training: PM M3 – Portfolio Management

- Consulting: Rollout, Tailoring, coaching, reviews, …

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