PM²

Project Management Methodology

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EN

2025 Edition

About PM² and Projects

What is Project Management?

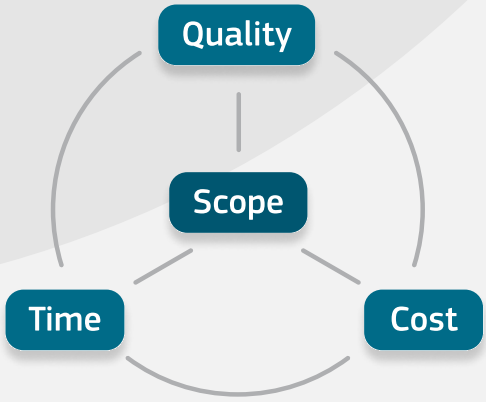
Project management is the disciplined work of designing and delivering, under agreed constraints and priorities, the best approach to achieve a project's business objectives. It plans, organises and monitors resources, and steers decisions and corrective actions so scope, time, cost and quality targets stay aligned.

Why do we do Projects?

Projects are initiated to solve a defined problem, satisfy a need, or pursue an opportunity. They deliver outputs which, when used create outcomes and benefits, moving the organisation to an improved state and supporting its strategic objectives and expected ROI.

What is a Project

A project is a temporary organisational investment, with a temporary governance set-up and team dynamics, created to implement a chosen solution. It is defined by a unique set of objectives for scope, time, cost and quality (and their priorities). Outputs are a means to enable outcomes that realise business objectives and benefits.



Key project characteristics

Temporary
Start & End

Unique
Non routine

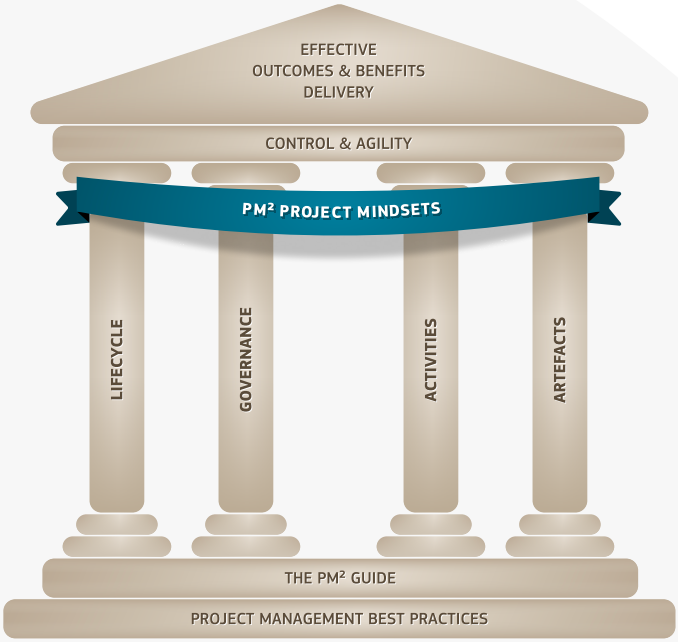
Output/Deliverables
Product or Service

Constraints
Such as Schedule, Budget, Policies, Culture

- **Temporary** means that the project has a well-defined end.
- **Unique** output means that the project's deliverables have not been created before. They may be similar to other deliverables, but there will always be a certain level of uniqueness to them.
- The project is defined, planned and executed under certain **constraints** related to schedule and budget, related to the project's organisational environment and culture, capabilities, available capacity, etc., or other external constraints.
- The output of a project may be a **product** (e.g. a new application), or a **service** (e.g. a consulting service, a conference or a training).

The PM² Methodology Architecture

PM² is an effective and lean project management methodology. It incorporates elements from a wide range of globally accepted project management best practices and operational experience from EU Institutions. The purpose of PM² is to help the Organisations implement Project Management by providing a concise and complete framework within which effective project management can take place.



PM² is supported by four pillars:

I a project **governance** model (i.e. Roles & Responsibilities).

II a project management **lifecycle** (i.e. the Project Phases).

III a set of project management **activities**.

IIII a set of project **Artefacts** (i.e. documentation templates and guidelines).

The spirit of PM² is further defined by the PM² Project **Mindsets**, which provide a common set of beliefs and values for PM² project teams.

The PM² Methodology provides answers to the following fundamental questions:

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

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

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

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

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

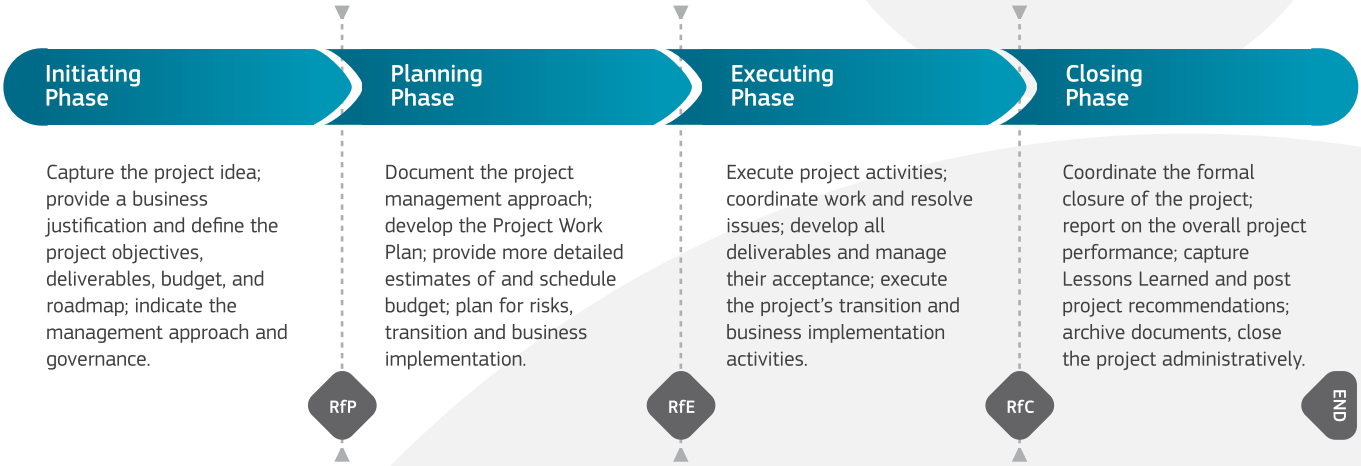
The PM²-Project Lifecycle

All projects progress from initiation to delivery and closure. PM² structures this journey by dividing the overall duration into distinct Phases.

Each Phase groups together the management activities and artefacts that typically belong to the same stage. This helps teams organise work, clarify near-term objectives, and apply the right level of planning and control before moving forward.

Project Phases

PM² provides a simple and effective lifecycle which organises project management activities into **4 sequential and non-overlapping** Phases (Initiating, Planning, Executing, and Closing) and into one overarching Process (Monitor & Control).



Phase Gates

In each of the PM² Phases, specific project management objectives need to be achieved. Based on the degree to which these objectives have been achieved, the project can be allowed to move forward to the next Phase.

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

- RfP — **Ready for Planning**: at the end of the Initiating Phase.
- RfE — **Ready for Execution**: at the end of the Planning Phase.
- RfC — **Ready for Closing**: at the end of the Executing Phase.
- END — **Project Ended**: with the completion of the Closing Phase.

Monitor & Control

Monitor & Control activities span the full project lifecycle. Monitoring provides an accurate view of progress against the baseline plans and agreed targets. Control turns that insight into action by deciding and implementing corrective measures when performance deviates, ensuring delivery remains aligned with approved objectives.

The PM² Monitor & Control process groups together a number of recurrent project management activities.

These activities ensure that the project progresses as planned and that corrective actions are taken when either project delivery or project management activities deviate from plan, or when actual results differ from the expected outcomes.

Activities

Manage Project Objectives

Track scope, schedule, cost and delivery-quality against the baselines; forecast trends; and trigger corrective actions or trade-offs early, so the project remains aligned with the approved objectives.

Manage Project Change

Capture, assess and route change requests through agreed governance; quantify impacts on scope, time, cost and quality; and ensure approved changes are integrated into plans, logs and work packages.

Manage Risks

Identify and assess threats and opportunities; agree response strategies (mitigate, avoid, transfer, accept); assign owners; and monitor exposure so risk responses remain effective as conditions and assumptions shift.

Manage Issues

Log issues that have materialised; prioritise and assign actions; escalate when thresholds are reached; and track resolution and decisions so blockers are removed quickly and accountability stays clear.

Manage Stakeholders & Communications

Maintain a live view of stakeholder expectations and influence; engage key groups through two-way channels; and transparently share status, risks and decisions using the Communications Plan and agreed freequency .

Manage Quality

Assure the quality of project management; run phase assessments gates, reviews and audits; address non-conformities; and improve ways of working to ensure project management quality.

Manage Deliverables Acceptance

Orchestrate formal reviews, testing and sign-off against agreed acceptance criteria; record approvals and non-conformities; and ensure deliverables are ready for handover without last-minute surprises.

Manage Lesons

Capture learning from events, meetings and milestones; validate what worked and what failed; convert insights into improvements; and feed them into the repository so future projects avoid repeat errors.

Manage Integration & Transition

Coordinate deployment and handover of outputs to operations; align readiness, support, documentation and training; and manage cut-over activities so the organisation moves to the new state with minimal disruption.

Manage Business Implementation

Drive adoption of the new solution by executing change, training and communications; monitor uptake and capability; and plan post-project actions so outcomes and benefits are realised in operations.

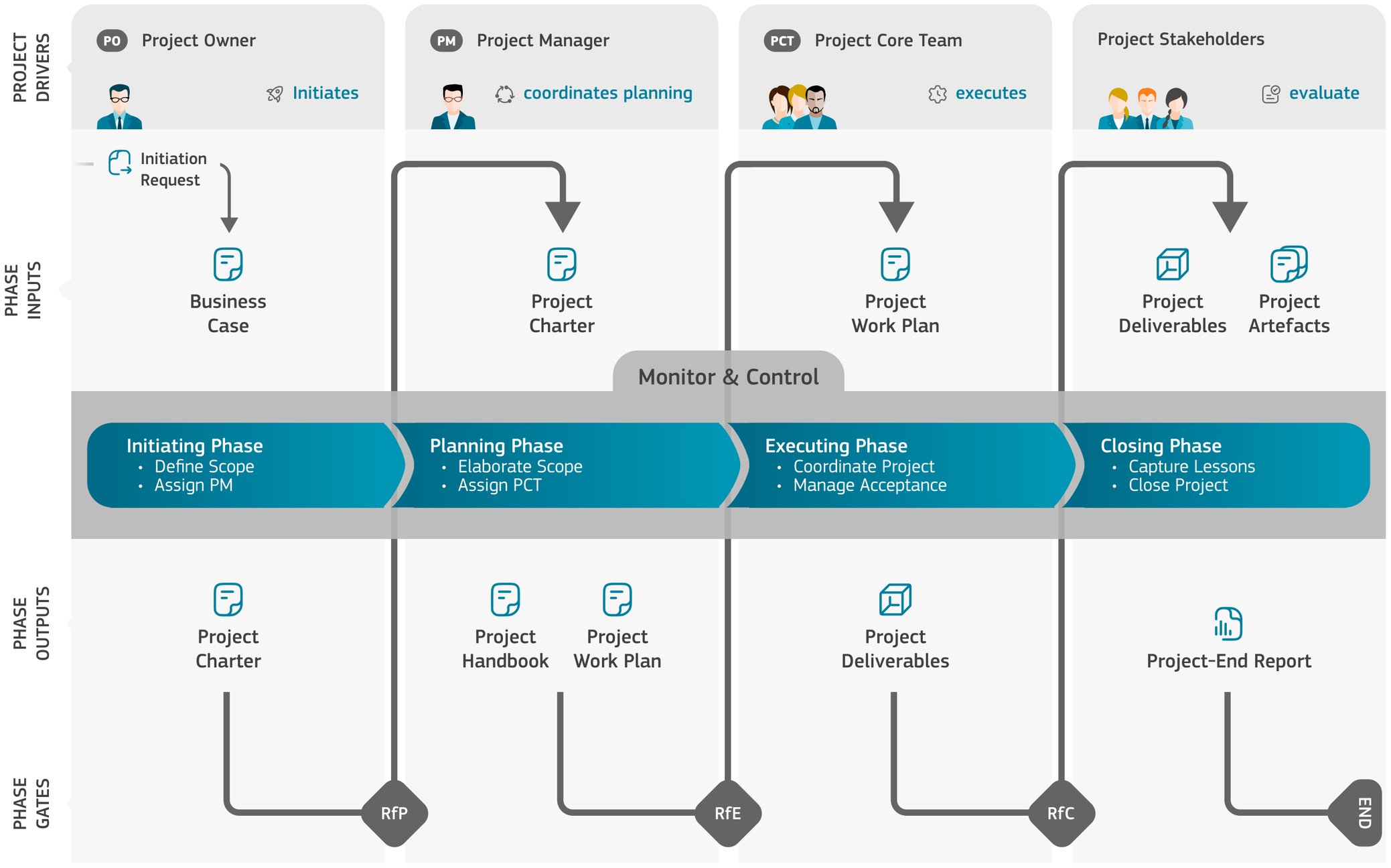
Manage Outsourcing & Procurement

Manage suppliers and contracted work against the outsourcing/procurement approach; monitor service levels, costs and schedules; handle contract changes and risks; and validate interim and final deliverables.

Manage Reporting

Produce tailored reports that summarise performance, milestones, forecasts and log status; present them in project forums; and archive them so stakeholders can take informed decisions on evidence.

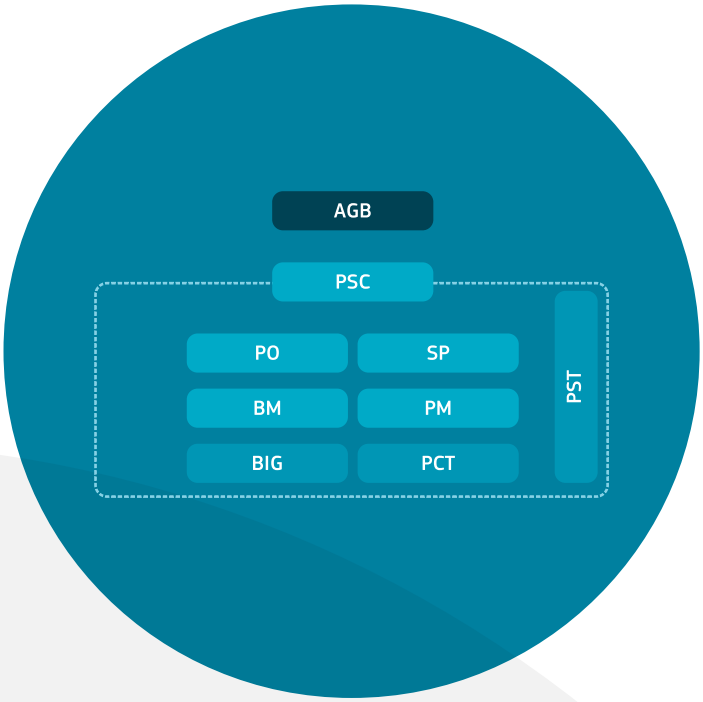
PM²-Project Swimlane Diagram



Governance

Project governance is the framework within which project management decisions are made. It defines all project roles and their associated responsibilities.

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



Governing Layer

AGB

Appropriate Governance Body (AGB)
As the ultimate decision-making body, the AGB approves the project idea and budget and authorises the Planning and Execution of the project. It can also authorise the termination of the project.

Steering Layer

PSC

Project Steering Committee (PSC)
The Project Steering Committee (PSC) comprises the Project Owner (PO), the Business Manager (BM), the Solution Provider (SP) and the Project Manager (PM). Other expert roles can participate as needed. The Project Steering Committee (PSC) safeguards the project management quality and helps to steer the project.

Directing Layer

PO

Project Owner (PO)
The Project Owner (PO) is accountable for the project's success, whereas the day-to-day management of the project is delegated to the Project Manager (PM), who focuses on achieving the project's objectives.

SP

Solution Provider (SP)
Provides resources, ensures delivery quality, and manages outsourcing.

Managing Layer

BM

Business Manager (BM)
Responsible for realising the intended benefits, based on the project's outcome(s).

PM

Project Manager (PM)
Responsible for most project management activities with a focus on the realisation of the project's scope within the time, cost and quality goals set.

Implementation Layer

BIG

Business Implementation Group (BIG)
Assists the Business Manager (BM) in project definition and Business Implementation planning and execution.

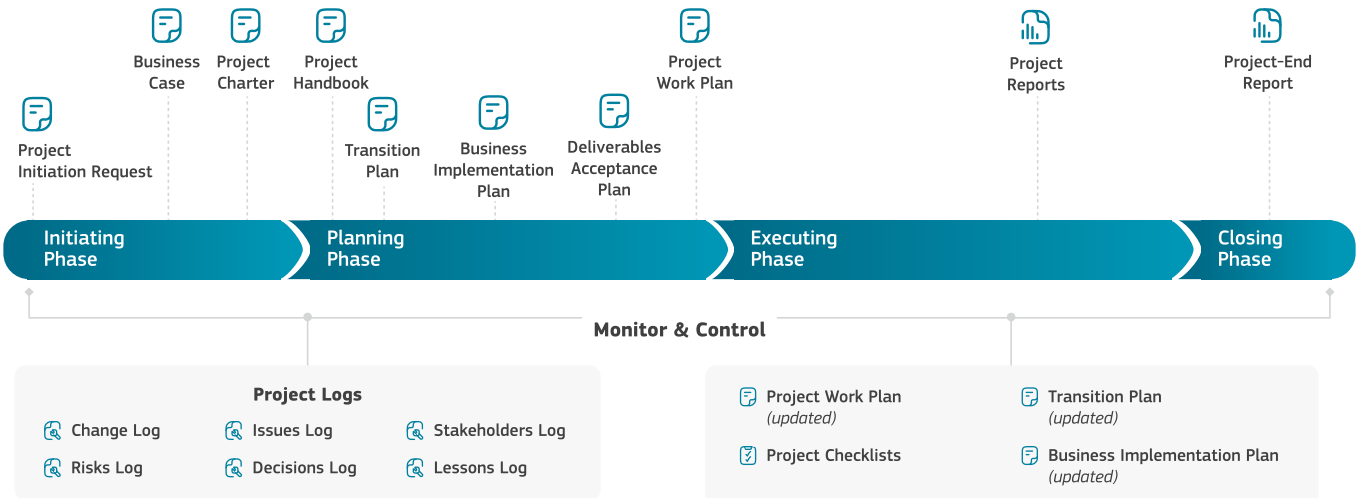
BIG

Project Core Team (PCT)
A team of specialist roles that carry out the project work and produce the project deliverables, coordinated by the Project Manager (PM).

PST

Project Support Team (PST)
Supports the Project Management Layer on management-related activities.

Key Artefacts



Selected Descriptions

Project Initiation Request

Captures the project idea with a high-level description of the business context and the desired outcomes.

Project Business Case

Presents the project goals and provides both a business justification for the funding of the project investment.

Project Charter

Defines the project objectives of scope, time, cost, and quality, the project deliverables, the work packages, and the project's roadmap and budget.

Project Handbook

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

Project Work Plan

Documents the project work packages, activities and deliverables, as well as the detailed schedule and budget.

Transition Plan

Documents the activities relating to the integration and transition of the results of the project.

Business Implementation Plan

Documents the project's business implementation activities, along with the benefits realisation plan.

Project-End Report

Summarises the project's overall performance, captures important lessons learned, and post-project recommendations.

Project Logs

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

Project Reports

Project Reports provide structured, time-based updates on progress and performance against the baselines. They consolidate key information on schedule, cost, scope, quality, risks, issues, changes, deliverables status and upcoming milestones, enabling timely decisions, escalation where needed, and transparent stakeholder communication.

Project Checklists

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

About PM²-Agile

PM²-Agile adds an Agile delivery layer to a PM² project. It preserves PM² governance, roles and decision-making, while enabling iterative delivery through an Agile Project Core Team and timeboxed planning and review cadences.

PM²-Agile complements PM² for projects with agile practices, while keeping decisions and controls at the managing and directing layers. It clarifies key tailoring choices, planning horizons (releases/iterations), reporting links to PM² status and progress, and how risks, issues and changes are handled across the full project organisation.

Key characteristics of Agile:

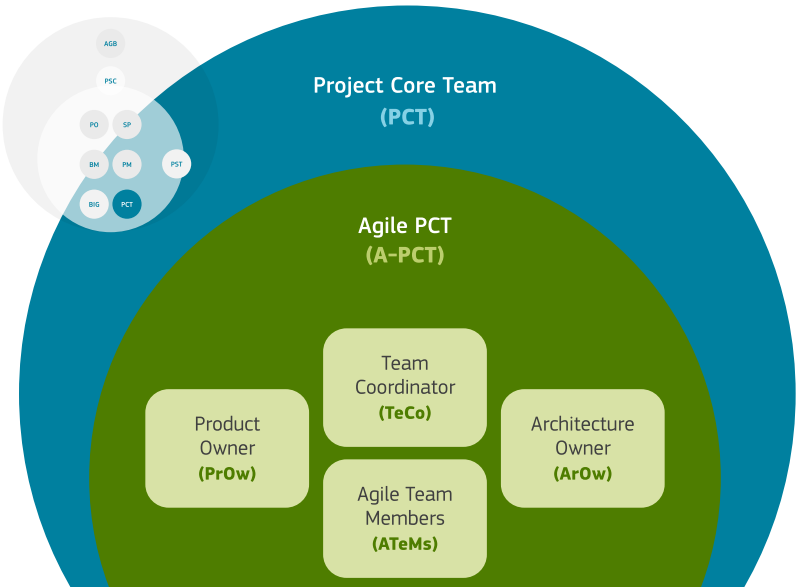
- Focus on delivering value early and frequently
- Decisions are based on what is know.
- Close collaboration between all parties involved
- Continuous stakeholder involvement at all levels
- Just enough up-front planning and documentation
- Plans created with the involvement of team members
- Incremental development with short cycles
- Scope management by continuous (re)prioritisation of work items
- Embracing change, continuous learning and improvement

Benefits of Agile:

- A lean management approach
- Delivers value early and frequently
- Increased team collaboration and stakeholder engagement
- Higher team productivity, moral and ownership
- Early, frequent and predictable delivery
- Reduced delivery risk
- Enhanced ability to adapt to changing requirements
- Increased focus on business value
- Improved quality of deliverables
- Increased Stakeholder satisfaction

PM² Agile Governance

PM²-Agile governance extends the standard PM² model by keeping the directing and managing layers unchanged, while adding an Agile delivery core within the Project Core Team. The Agile Project Core Team operates using timeboxed planning, review and adaptation cycles to provide regular inputs for reporting, escalation and change decisions. These roles clarify accountabilities for facilitation, prioritisation, architecture and delivery execution.



Team Coordinator (TeCo)

Acts as a facilitator and team coach. Creates and fosters the conditions to allow the team to be focused on achieving specific objectives and being successful.

Product Owner (PrOw)

Represents mainly the requestor and end-users perspectives and concerns. Understands the needs and priorities of the stakeholders.

Architecture Owner (ArOw)

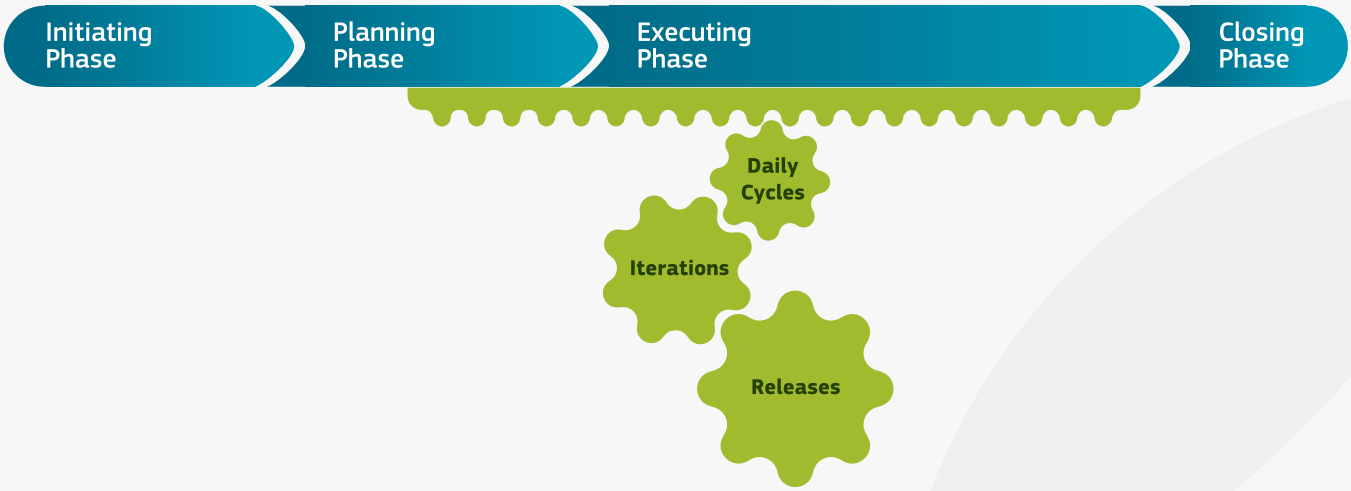
Responsible for architecture decisions. Facilitates the creation and evolution of the overall solution design and ensures it follows the Organisation's Enterprise Architecture principles.

Agile Team Member (ATeM)

Focuses on development of the solution. Encompasses different disciplines of development such as architecture, analysis, design, planning and estimation, development and testing.

PM² Agile Lifecycle

From an Agile perspective, projects may have several releases as a result of the incremental progress achieved in one or more iterations. Additionally, the output of each iteration is the result of the incremental progress achieved every day. This multilevel approach spans mainly the Executing Phase of the project, and at all three levels (i.e. Releases, iterations, and daily cycles), value is delivered and feedback is collected.



PM² Agile Artefacts

Documenting the work planned and performed in the Agile layer is critical in increasing transparency and coordination between the different layers of the PM² project organisation (i.e. between the directing, managing and performing layers). Supporting PM²-Agile is a set of artefacts used to capture and document information regarding the management approach and Agile Project Core Team (A-PCT) activities, milestones, issues and progress reporting.

Descriptions of Key PM² Agile Artefacts

Development Handbook

Explains how PM²-Agile is applied in the project and how it connects to the Project Handbook. It records tailoring choices (what is adapted and why), Agile roles, selected artefacts/tools, and how delivery progress is tracked and reported. Updated iteratively, it becomes a stable reference for onboarding, governance discussions, and end-of-project review.

Agile Logs

Extend Project Logs to capture delivery-specific risks, issues, decisions, and changes emerging from agile work, ensuring traceability and visibility of impacts at project level. They support monitoring and forward-looking control (e.g., emerging dependencies, impediments, change effects), and enable structured handover/ escalation between Project Manager and Agile team. They also include testing evidence and retrospective outputs.

Development Work Plan

Consolidates the Work Items List with Release and Iteration Plans to steer delivery, prioritisation, and forecasting. It is revised as priorities, estimates, and delivery capacity evolve, and it is kept aligned with project-level milestones because it feeds the Project Work Plan. Typically maintained in a backlog/board tool or other standard template.

Development Reports

Provides development status and progress information that can be understood at managing-layer and governance level, translating agile metrics and delivery signals into project reporting. It summarise what was delivered, what is next, key changes, major risks/issues, decisions needed, and actions underway, with ad hoc updates triggered by high-impact developments. It is made part of the Project Status Report.

PM²-Project Mindsets

Mindsets are the glue that holds the four PM² pillars together. They provide a common set of beliefs and values for all project practitioners. The PM² Mindsets are the attitudes and behaviours that help organisations and teams focus on what is important in achieving their project and project management objectives. They help project teams navigate the complexities of managing projects within their organisations and make PM² for projects both more effective and more complete.

Teams that practice PM² for projects:

1. **Apply PM²** best practices to manage their projects.
2. **Remain mindful** that methodologies are there to serve the needs of their projects, not the other way around.
3. Maintain an **outcomes orientation** in relation to all project **and** project management activities.
4. Are **committed to** delivering projects with **maximum value** rather than just following plans.
5. **Foster** a culture of collaboration, clear **communication**, and **accountability** within the project.
6. **Assign** project roles to the most **appropriate** people for the benefit of the project.
7. **Balance** the project management Ps, such as purpose, politics, and plan in the most productive way possible.
8. **Invest** in developing the personal competences necessary to **become better** project contributors.
9. **Involve** stakeholders in the planning and executing of the project's **business implementation** activities.
10. **Share knowledge**, actively manage Lessons Learned, and contribute to the **improvement** of project management within their organisations.
11. Draw **inspiration** from the PM² Guidelines on Ethics and Professional Virtues.

IAQs

To remain mindful of the PM² Mindsets, project managers and team members should ask themselves the following important Infrequently Asked Questions (IAQs):

Do we know what we are doing?

Tip: Develop a clear and shared project vision and define the project objectives and boundaries.

Do we know how to do it?

Tip: Manage the project using a holistic approach and optimise the whole project, not just parts of it. Actively manage the integration of project deliverables and coordinate the transition and business implementation activities. Follow a process but stay Agile to address the complexities that emerge and try to regularly remind yourself why you are doing something.

Do we know why we are doing it? Does anyone really care?

Tip: Make sure your project matters. Understand its goals, value and impact, and how it relates to the organisational strategy. Define upfront what project success is and deliver maximum value and real benefits, not just outputs.

Is this important?

Tip: Everything is NOT equally important. Identify, and agree on, the project's Critical Success Criteria (CSC), Minimum Viable Product (MVP) and Critical Success Factors (CSFs) and allocate effort and attention both tactically and strategically for the benefit of both the project and project management goals.

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.

Are the right people involved?

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

Deliver at any cost or risk?

Tip: Show respect for people's work and organisational funds and avoid high-risk behaviour and tactics. Always keep in mind that it is not just about the end result - how you get there also matters. Manage your projects based on positive values and principles.

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

Tip: Make sure that client and provider groups work as one team towards a common goal. Real teamwork really works; so foster clear, effective, and frequent communication while allowing for the necessary autonomy and control that teams need to be creative and effective.

Should I be involved?

Tip: Contribute from any position. Be proud of the skills, value, and positive attitude you bring to the project. Help everyone who needs to be involved get involved. Promote and facilitate the contributions of all stakeholders.

Have we improved?

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

Is there life after the project?

The product (or service) lifecycle has just begun! Make sure you have contributed to its success.

Quick Start Tips

The purpose of this section is to help you get started with using PM² for project management. Naturally, you will want to learn more about PM², but keep in mind that you do not need to become an expert before initiating your projects. Below, you will find some Quick Start Tips, which aim to jump-start your project with PM².

1 Discover the available PM²-Project resources:

- Review the PM²-Project Guide.
- Consult the PM²-Project resources available online (e.g. articles, templates, discussions, etc.).
- Follow a project management training.
- Share these resources within your organisation, teams, and stakeholders.

2 Develop a higher degree of Project orientation:

- Understand the benefits of organising work as projects.
- Take the PM²-Project Mindsets on board.
- Get your organisation, team, and stakeholders on board.

3 Organise a kick-off meeting:

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

4 Clearly define the Project's Governance:

- Discuss the project Governance and assign the Project Roles.
- Review the Responsibilities and achieve clarity.
- Clearly distinguish the Project Roles & Responsibilities from the Functional Roles & Responsibilities.

5 Document the project's relevance to the organisation's priorities:

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

6 Define the Project's management approach and documentation needs:

- Tailor PM²-Project.
- Create the Project Handbook to define the management approach.
- Define what project artefacts (documentation) are required.

7 Produce the Key Project Artefacts

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

8 Plan the Project's Monitor & Control activities.

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

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

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

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