

Organisation [Name]

Department [Name]

Programme Handbook

**<Programme Name>**

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# About the Programme Handbook

The Programme Handbook documents the selected approach for implementing the programme goals. It also highlights the key controlling processes to be used, the programme policies and rules, and the overall management approach. *<The programme scope statement (from the Programme Charter) is a key input for this document.>*

The Programme Handbook is an important document since it defines the outputs of the planning (i.e., it defines the plans necessary for managing the programme as well as to what extent they should be customized or/and tailored).

The Programme Handbook becomes the basis for managing the programme throughout its lifecycle and is a critical point of reference for all programme members and stakeholders. The Programme Handbook is kept up to date throughout the life of the Programme. During the Closing Phase, the Programme Handbook becomes a crucial point of reference for the Programme-End Review Meeting and should be properly closed and archived.

# Programme Approach

## Programme Lifecycle

*<Present the Programme management lifecycle (phases) to be used in the Programme and how the Programme will move forward from one phase to the next (i.e., the planned approvals or gates) and describe any deviations from the standard PM2 programme management lifecycle.*

*If applicable to your programme, you can also define any planned work-stages or iterations and described the planned approach and key stage/iteration outputs.>*

## PM² Tailoring

*<Determine which programme management plans are necessary for the programme. The complexity of the programme, the possible risks and the Programme Steering Committee influence this decision. Use the list below or/and add/delete items in the list as per your programme's needs.>*

|  |  |  |  |
| --- | --- | --- | --- |
| **Artefact** | **Yes/**  **No** | **Location** | **If No, briefly explain the reason.** |
| Programme Initiation Request |  |  | Emergent programme |
| Programme Business Case |  |  |  |
| Programme Charter |  |  |  |
| Programme Handbook (*this document)* |  |  |  |
| Stakeholder Matrix |  |  |  |
| Project Work Plan (s) |  |  |  |
| Other… |  |  |  |
|  |  |  |  |

## Other Standards

*<Define any other methodologies specific to the programme's domain or* *standards that must be considered for the planning and application of PM2-PgM processes.>*

Additionally, the programme will follow other (domain specific) methodologies as described below:

* Example 1
* ….

*<Customise the above list as per your programme or/and organization needs.>*

The following standards were considered when defining programme approach:

* Decision 1
* Decision 2
* ….

*<Customise the above list as per your programme or/and organization needs.>*

## Specific Programme Management Rules

*<Define any specific programme management rules that will be applied in the programme. The purpose of documenting programme rules is to establish an agreeable set of "rules of conduct" that will facilitate the better management and execution of the programme.*

*Programme rules are usually related to defining rules regarding stakeholder/team interactions, communication, meetings, collaboration etc., and especially those aspects which cannot be easily covered by the programme methodology, communication plan, meeting, and reporting templates, or which are extremely specific chosen programme management style.*

*Programme rules can be related to the specific programme or overall programme/organizational context, or/and can be derived directly from the programme's critical success factors, programme management objectives and the PM2 Mindsets (found in the PM2 Guide v3).*

*Inputs (information) that can be used to define the programme rules are the meeting minutes of the Programme Planning Kick-off Meeting, "pre-programme" information, and lessons learned from programmes with similar objectives, constraints, risks, or issues.>*

## Conflict Resolution and Escalations

*<In this section the conflict resolution process for the programme is defined. At the time of the conflict, the team can either effectively resolve it or escalate if necessary.*

*Typically, conflict can arise in any of the levels below:*

* *Within the Programme Core Team;*
* *Within a specific domain (e.g., the IT Community);*
* *With the client/requestor side or the user community;*
* *With a Contractor.>*

Conflicts are situations in which one or both parties perceive a threat. They are critical issues and can be raised by any programme stakeholders. The Programme Management team should proactively identify, log and raise such issues for resolution. When required, conflicts are discussed on the weekly Programme Follow-up Meetings or, if needed, escalated to the Programme Steering Committee (PgSC).

Conflict resolution activities are registered in the Issue Log, while conflict resolution decisions can be logged in the Decision Log.

The escalation procedure for this programme is as following:

* For issues/changes/risks with Very Low and Low impact, the Programme Manager (PgM) must be informed, and decisions should be registered in the Decision Log.
* Issues/changes/risks with medium impact need to be approved by the Managing Level (both the Programme Manager and Business Manager) during the Programme Follow-up Meetings.
* Issues/changes/risks with High and extremely High impact are approved by the Programme Steering Committee (PgSC);
* When relevant, the Programme Steering Committee (PgSC) has extraordinary meetings for approving remediation actions related to urgent or very urgent issues with considerable impact or size.

*<Customise the above process as per your programme or/and organization needs.>*

# Programme Processes

## Risk Management

*<This is a high-level description of the risk management process to be used, which can be customized to the specific programme and organizational context as necessary. Consider creating a separate more extensive programme's Risk Management Plan for large, complex programmes.>*

The programme risk management process defines the activities to identify, assess, prioritise, manage, and control risks that may affect the execution of the programme and the achievement of its objectives. This is a four-step process:

* **Risk Identification:** risks are continuously identified throughout the programme lifecycle by any programme stakeholder and documented in the Risk Log (by any programme team member).
* **Risk Assessment:** risks are assessed based on their likelihood of occurrence and the impact in programme objectives. The product of their likelihood and impact defines the Risk Level which is then used as a reference for their prioritisation and risk response development.
* **Risk Response Development:** there are four strategies to be considered as risk responses: Avoid Transfer or Share, Reduce or Accept a risk. After the strategy for each risk has been selected, specific actions to implement the strategy will be defined, described, scheduled and assigned, while a Risk Owner assumes the responsibility for its implementation. These actions will be incorporated into the Programme Work Plan.
* **Risk Control:** the Programme Follow-up Meetings are used to revise the status of risks and related actions, and to identify new risks. Risks will be revised weekly, but also after the occurrence of any significant event. If any of the identified risks occur, then the Programme Manager (PgM) will implement the contingency plans and communicate the issue to the Programme Steering Committee (PgSC).

*<Customise the above process as per your programme or/and organization needs.>*

## Issue Management

*<This is a high-level description of the programme issue management process to be used, which can be customised to the specific programme and organizational context. Consider creating a separate more extensive programme's Issue Management Plan for large, complex programmes.>*

The programme issue management process defines the activities related to identifying, documenting, assessing, prioritizing, assigning, resolving, and controlling issues. It is a four-step process that the Programme Manager (PgM) executes whenever required throughout the programme lifecycle:

* **Issue Identification:** Issues can be identified by any programme stakeholder throughout the programme lifecycle, using different communication channels such as meetings, emails, and reports. The issues are registered in the Issue Log.
* **Issue Assessment and Action Recommendation**: a first informal assessment considers the category, impact, urgency, and size of the issue, followed by a more detailed analysis to identify the root cause, and recommend a solution. This information is documented in the Issue Log and used as input to the appropriate decision makers (based on the escalation process). The decision is documented in the Decision Log.
* **Actions Implementation:** After issues are evaluated and the remediation actions approved, the Programme Manager (PgM) will incorporate these actions into the Programme Work Plan and update programme related documentation such as programme plans and logs.
* **Issue Control:** Programme Follow-up meetings will be performed weekly and used to revise the status of issues and related actions, and to identify current issues. Additionally, the Programme Manager (PgM) will report monthly the status of the significant issues to the Programme Steering Committee (PgSC) and, when adequate, to other programme stakeholders

*<Customise the above process as per your programme or/and organization needs.>*

## Programme Change Management

*<This is a high-level description of the programme change management process to be used, which can be customised to the specific programme and organizational context. Consider creating a separate more extensive Programme Change Management Plan for large, complex programmes.>*

The programme change management process defines the activities related to identifying, documenting, assessing, approving, prioritising, planning, and controlling changes, and communicating them to all relevant stakeholders. It is a five-step process that the Programme Manager (PgM) executes whenever required throughout the programme lifecycle:

* **Change Identification:** a request for a change can be submitted formally via a Change Request Form or can be identified and raised during meetings because of decisions, issues or risks. The Change Log contains information to identify the change, such as the requestor, a brief description, identification date, etc.
* **Change Assessment and Action Recommendation**: the size and impact of the change on the programme objectives is assessed, where after a recommended action will be documented by the Programme Manager (PgM) in the Change Log., This information is then used as an input to the formal change approval by the appropriate decision makers.
* **Change Approval:** the approval of a programme change will follow the defined escalation process for this programme. For changes which do not have significant impact on delivery time and budget, the changes can be approved during the Programme Follow-up Meetings. Other changes (having a size L or XL) are approved by the Programme Steering Committee (PgSC). The decision details are documented in the Change Log.
* **Change Implementation:** the activities related to the implementation of approved changes will be documented in the Programme Work Plan.
* **Change Control:** new or open changes will be identified/reassessed weekly during the Programme Follow-up Meetings and the Programme Manager (PgM) will then update the Change Log with the results of the analysis/review. For the Medium, High, and very High Size changes, the Programme Manager (PgM) will report monthly their status to the Programme Steering Committee (PgSC) and, when adequate, to other programme stakeholders.

*<Customise the above process as per your programme or/and organization needs.>*

## Configuration Management

*<This is a high-level description of the configuration management approach to be used, which can be customised to the specific programme and organizational context. For large or complex programmes, consider integrating this plan into a separate more extensive Quality Management Plan.>*

The programme configuration management procedure comprises the identification of programme configuration items (CIs), their attributes and status codes, the establishment of baselines, the definition of roles and responsibilities for authorised changes to CIs, and the maintenance and control of a programme repository.

**Storage of programme management artefacts**

The Programme Manager (PgM) will structure the programme management artefacts per PM²-PgM phase, following the below folder convention:

* 01 Initiating
* 02 Planning
* 03 Executing
* 04 Monitor & Control
* 05 Closing

Naming convention of programme management artefacts

The following artefact naming convention will be used:  
(XX).(DocumentName).(ProgrammeName).(yyyy-mm-dd). v(x.x), where:

* (XX) (two numerical characters) unique artefact number within the folder indicating the artefact sequence.
* v(x.x) indicates the artefact version. Version numbers like "0.x" mean that the document has not been approved yet; minor changes will be reflected in the decimal (revisions number) and major changes (formal reviews) in the number.

**Versioning of programme management artefacts**

All programme management artefacts are under version control, except for the programme logs and checklists.

## Communications Management

*<This is a high-level description of the communications management approach to be used, which can be customised to the specific programme and organizational context. Consider creating a separate more extensive Communication Management Plan for large, complex programmes.>*

The communications management process determines how to communicate most efficiently and effectively to the various stakeholders. It defines and documents the communication items content, format, frequency, the audience, and expected results. It also defines how to communicate programme status and the assignment of activities to the various stakeholders, and the communication strategy for each stakeholder, based on their interests, expectations, and influence in the programme.

The following programme meetings will be organised:

|  |  |  |
| --- | --- | --- |
| **Meeting** | **Chair** | **Frequency** |
| Kick-off Meeting | Programme Manager (PgM) | Once |
| Programme Status Meeting | Programme Manager (PgM) | Every 2 weeks |
| Project Status Meetings | Programme Manager/Specific Project PSC Meetings | Ad hoc for projects that may be more significant in the programme |
| Programme Core Team Meeting | Programme Manager (PgM) | Weekly |
| Programme Progress Meeting | Programme Manager (PgM) | Quarterly |
| Programme Steering Committee Meeting | Programme Owner (PO) | Monthly |
| Change Control Meeting | Programme Manager (PgM) | Ad Hoc |
| Programme-End Review Meeting | Programme Manager (PgM) | Once |

The following programme reports will be delivered:

|  |  |  |
| --- | --- | --- |
| **Report** | **Responsible** | **Frequency** |
| Programme Status Report | Programme Manager (PgM) | With Follow-up meeting |
| Programme Progress Report | Programme Manager (PgM) | After Review Meeting |
| Programme-End Report | Programme Manager (PgM) | With Programme-End Review |

*<Customise the above process as per your programme or/and organization needs.>*

## Business Implementation Management

*<Present a high-level summary of the business implementation management approach to be used to prepare and change the performing organisation to use the programme's outputs or/and simply provide a link to the programme's Transition Plan.>*

The business implementation management process comprises the activities related to prepare and manage the changes to the organisation that will occur because of the programme. This process consists of the following steps:

* **Identify Impact on Processes:** assess how the programme will affect already existing business processes in the performing organization. Define the new business processes. Strive to disrupt normal business operations as little as possible during programme implementation.
* **Identify Impact on People:** assess how the programme will impact the people using the programme's outputs. Consider resistance-to-change, communication, functional support, training, etc.
* **Identify Impact on Culture:** assess how the programme will have an impact on the organisational culture. Consider individual or group behaviour, organizational practices, or shared values.
* **Define Implementation Strategy:** define the communication strategy, promotional and other change activities that fall within the programme's responsibilities and that will promote a smooth implementation of the programme's outputs into the organization.
* **Define Change Activities:** define necessary change activities that support the implementation strategy. Consider programme activities, change activities for the organisation and post-programme change activities.

*<Customise the above process as per your programme or/and organization needs.>*

## Resource Management

*<This section should present how the necessary resources will be acquired, managed and, if necessary, released at the end of the programme. Resources can be human (people with specific skills) or non-human (for example hardware, licences, a building, a meeting room…*

*For human resources, this section should describe how external resources can be contracted (allowed framework contracts etc.), measured and released. For internal resources, any temporary authority delegation, re-organisation in the hierarchy, need to be clarified to avoid authority conflicts. If additional training is needed the following elements from the Resource Plan can be added.>*

## Benefits Management

Programmes are driven by the need of delivering benefits. A benefit is defined as "a positive improvement perceived as such by one or more stakeholders resulting from the implementation of one or more initiatives. It supports achievement of strategic objectives. Benefits must be measurable and can be further clarified by specifying Key Performance Indicators for each benefit area.

Benefits management involves identifying, planning, measuring, and tracking benefits from the start of the programme investment until their delivery.

# Programme Progress Measurement

## Programme Progress Measuring Approach

*<This section should provide a summary of the programme progress measuring approach that will be used for the monitoring (tracking) and controlling of the programme.*

*It is useful to also define in this section what information will be tracked (e.g. Effort spent, money spent, etc.) and how often.>*

## Programme Reports

*<In the subsection below, define and describe the reports to be used during this programme. The frequency, medium and recipients will be defined in the Communications Management Plan.>*

### Status and Progress Reports

*<In this section the distinct types of progress reports should be defined and briefly described, and links to the report templates should be provided. As per the programme configuration rules, the location of the folder with all the completed progress reports should also be provided.>*

### Other Reports

*<In this section all other types of programme reports should be defined and briefly described and links to the report templates and the location of the folder with all the completed reports should be provided.>*

# Programme Artefacts

* Programme Initiation Request
* Programme Business Case
* Programme Charter
* Programme Handbook
* Programme Logs
* Programme Stakeholder Matrix
* Programme Communication Management Plan
* Programme Work Plan
* Programme Business Implementation Plan
* Programme Change Request
* Programme Status Report
* Programme-End Report

# Programme Roles & Responsibilities

## Consolidated Responsibilities Assignment Matrix (RAM/RASCI)

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Initiating** | **AGB** | **PgSC** | **PgO** | **PgBM** | **PgM** | **PM** | **PgSO** |  |
| Programme Initiation Request | I | n/a | **A**/S | **R** | n/a | n/a | n/a |  |
| Programme Business Case | I | (C) | **A** | **R** | (S) | n/a | n/a |  |
| Programme Charter | I | **A** | C | S | **R** | n/a | n/a |  |
| **Planning** | **AGB** | **PgSC** | **PgO** | **PgBM** | **PgM** | **PM** | **PgSO** |  |
| Programme Handbook | I | **A** | C | S | **R** | n/a | S |  |
| Programme Stakeholder Matrix | I | I | **A** | S | **R** | n/a | S |  |
| Programme Communication Plan | I | **A** | C | S | **R** | n/a | S |  |
| Programme Business Implementation Plan | I | **A** | C | **R** | S | n/a | S |  |
| Programme Work Plan | I | **A** | C | S | **R** | n/a | S |  |
| **Executing** | **AGB** | **PgSC** | **PgO** | **PgBM** | **PgM** | **PM** | **PgSO** |  |
| Project Initiation Request | I | I | **A** | S | **R** | I | S |  |
| Programme Status Report | I | I | **A** | S | **R** | S | S |  |
| Programme coordination | I | I | **A** | S | **R** | C | S |  |
| **Monitor & Control** | **AG** | **PgSC** | **PgO** | **PgBM** | **PgM** | **PM** | **PgSO** |  |
| Manage programme change | I | **A** | I | S | **R** | I | S |  |
| Monitor programme performance | I | **A** | I | S | **R** | I | S |  |
| Control schedule | I | **A** | I | S | **R** | S | S |  |
| Control cost | I | **A** | I | S | **R** | S | S |  |
| Manage stakeholders | I | **A** | I | S | **R** | I | S |  |
| Manage risks | I | **A** | C | S | **R** | I | S |  |
| Manage issues & decisions | I | **A** | C | S | **R** | I | S |  |
| Manage benefits delivery | I | **A** | C | **R** | S | I | S |  |
| **Closing** | **AGB** | **PgSC** | **PgO** | **PgBM** | **PgM** | **PM** | **PgSO** |  |
| Programme-End Report | I | **A** | C | S | **R** | C | S |  |
| Sustain benefits delivery | I | **A** | C | **R** | S | I | S |  |
| Administrative closure | I | C | **A** | C | **R** | I | S |  |

## Description of Roles and Responsibilities

In the following section, the roles of major players in a programme are described alongside with the responsibilities, expectations, rights, and duties of each participant in the programme.

*<Only keep the roles relevant to your programmes. Any deviations to the Standard PM2 Roles & Responsibilities should be highlighted.*

*Bear in mind that a role that a person performs in a programme may be independent of his function in the personnel in a department. Nevertheless, certain roles necessitate a certain level of authority in the organisation as well as some competences that may appear at the function specification for a person. In such cases the descriptions of a role also mention the function that this person occupies in the organisation.>*

### Appropriate Governance Body (AGB)

**Description**

The Appropriate Governance Body (AGB) has the overarching authority over the programme and represents senior managers who are responsible for the investment decisions, defining the direction of the business, and ensuring the overall alignment of the programme with the strategic direction of the organisation. This body also ensures the programme complies with the corporate delivery standards and practices.

**Responsibilities**

* Defines the vision of the programme.
* Ensures alignment of the vision with the organisation’s strategic direction.
* Takes the investment decision and delivers the mandate of the programme.
* Appoints the Programme Owner (PgO).
* Gives strategic direction to the Programme Steering Committee (PgSC).
* Resolves issues that cannot be resolved on programme level.

### Programme Steering Committee (PgSC)

**Description**

Chaired by the Programme Owner (PgO), the prime purpose of the Programme Steering Committee (PgSC) is to drive the programme forward and deliver the outcomes and benefits. Members provide resources and specific commitment to support the Programme Owner (PgO), who is accountable for the overall success of the programme.

**Responsibilities**

* Delivers the programme within the defined mandate.
* Signs off key programme artefacts.
* Provides high-level monitoring and control of the programme.
* Scrutinises the delivery of the desired benefits.
* Defines projects within the programme priorities and resolves escalated conflicts, issues, and risks.
* Supports mitigating programme risks.
* Reports and escalates to the Appropriate Governance Body (AGB) when required.

### Programme Owner (PgO)

**Description**

The Programme Owner (PgO) is accountable for the success of the programme, ensuring that it meets its objectives and achieves the expected benefits. The individual who fulfils this role must be empowered to direct the programme and take decisions. The Programme Owner (PgO) provides leadership to the programme and assumes total accountability for delivery. This role requires seniority and authority.

**Responsibilities**

* Is accountable for the success of the programme.
* Develops and shares the vision of the programme.
* Ensures the programme budget is correctly allocated to the needs of the programme.
* Represents the interests of the programme in the Appropriate Governance Body (AGB).
* Keeps the programme aligned to any change in the organisation’s strategy affecting the programme.
* Chairs and directs the Programme Steering Committee (PgSC) and appoints its members.

### Programme Manager (PgM)

**Description**

The Programme Manager (PgM) assures the day-to-day management of a programme. Working in close collaboration with the Programme Business Manager (PgBM), the Programme Manager (PgM) reports to the Programme Owner (PgO).

**Responsibilities**

* Manages the programme and provides direction to the projects to achieve the intended programme objectives and benefits.
* Structures the programme in collaboration with the Programme Business Manager (PgBM).
* Gives direction to Project Managers (PM) and manages the project interdependencies.
* Develops and implements the programme management plans.
* Reports to the Programme Owner (PgO).
* Organises the Programme Steering Committee (PgSC) sessions and implements its decisions.
* Makes proposals to the Programme Steering Committee (PgSC) in agreement with the Programme Business Manager (PgBM), e.g., start a new project, delay a project, cancel a project.
* Escalates unresolvable programme risks or issues to the Programme Steering Committee (PgSC).
* Manages communication with programme stakeholders.

### Programme Business Manager (PgBM)

**Description**

The Programme Business Manager (PgBM) represents the Programme Owner (PgO) daily within the programme and collaborates closely with the Programme Manager (PgM). The focus of the Programme Business Manager (PgBM) is the achievement of the intended benefits in the business domain. In case multiple business domains are impacted by the programme, each domain might have its own Programme Business Manager (PgBM) appointed and represented in the Programme Steering Committee (PgSC).

Because a deep understanding of the performing organisation’s responses to change is required, it is highly recommended that this role is filled internally and not outsourced.

**Responsibilities**

* Assists the Programme Owner (PgO) on the specification of the programme regarding the business objectives and benefits to be delivered.
* Establish an efficient collaboration and communication channel with the Programme Manager (PgM).
* Designs the future operational state(s) for the impacted organisation.
* Is responsible for the programme's business implementation.
* Monitors the delivery of the benefits according to plan.
* Identifies business side risks affecting the programme.
* Reports to the Programme Owner (PgO).

# Appendix 1: References and Related Documents

<Use this section to reference (or append if needed in a separate annex) any relevant or additional information. Specify each reference or related document by title, version (if applicable), date, and source (e.g., the location of the document or the publishing organisation).>

|  |  |  |
| --- | --- | --- |
| **ID** | **Reference or Related Document** | **Source or Link/Location** |
| 1 | *<Example of a related document>*  *<03.Programme\_Charter.XYZ.11-11-2013.V.1.0.docx>* | *<Example of a location>*  *< U:\Documents\>* |
| 2 | Programme folder | *<Insert programme folder location.>* |
| 3 |  |  |