

## QUICKSTART STEPS

### 1 Define a Project Governance and create a Business Case

- Define the Project Steering Committee (PSC)
- Provide the justification for the project, capture the business requirements and establish its budgetary constraints

Business Case

### 2 Identify Stakeholders and create the Project Charter

- Define the project scope
- Identify those Stakeholders who should contribute to the Project Charter
- Capture the high-level requirements, assumptions and constraints
- Decide on a project approach, estimate required resources, costs and timing

Project Charter

### 3 Setup the Project Logs

- Setup the Risk Log, Issue Log, Decision Log and the Change Log. These logs will be used to document the management of Risks, Issues, Decisions and project Changes

Issue Log, Risk Log, Decision Log, Change Log

### 4 Start the Project Planning with a Meeting

- Invite all necessary participants to the planning meeting
- Go over the Project Charter and ensure a common understanding
- Communicate the next steps for the planning phase

Planning Kick-off Meeting

### 5 Tailor the Project Management approach

- Decide which planning documents to use and how they should be tailored
- Define rules, assign team responsibilities and define a conflict resolution process

Project Handbook

### 6 Develop a Communications Management Plan

- Identify all information requirements for the effective management of the project's communications
- Decide on the strategy, goals, frequency, format and recipients of the communication activities

Communication Plan

### 7 Create the Project Work Plan

- Break down the work that needs to be done in smaller and more manageable pieces (Work Breakdown)
- Estimate the effort and cost for each piece of work
- Establish the detailed budgetary and resource requirements
- Create a work schedule (identify dependencies, assign resources and dates)

Project Work Plan



## WHAT IS PM² ?

The PM² Methodology is the official project management methodology of the EC and is currently being rapidly adopted internationally. It is a lean and easy to implement methodology suitable for any type of project as it enables project teams to manage projects effectively and deliver solutions and benefits to their organisations and stakeholders.

PM² enables Project Managers to deliver solutions and benefits to their organisations through the effective management of project work. It is based on operational experience from projects run within the European Institutions, but also incorporates elements from a wide range of globally accepted project management best practices, standards and methodologies such as PMBoK Guide, PRINCE2®, IPMA-ICB.

### PM² provides:

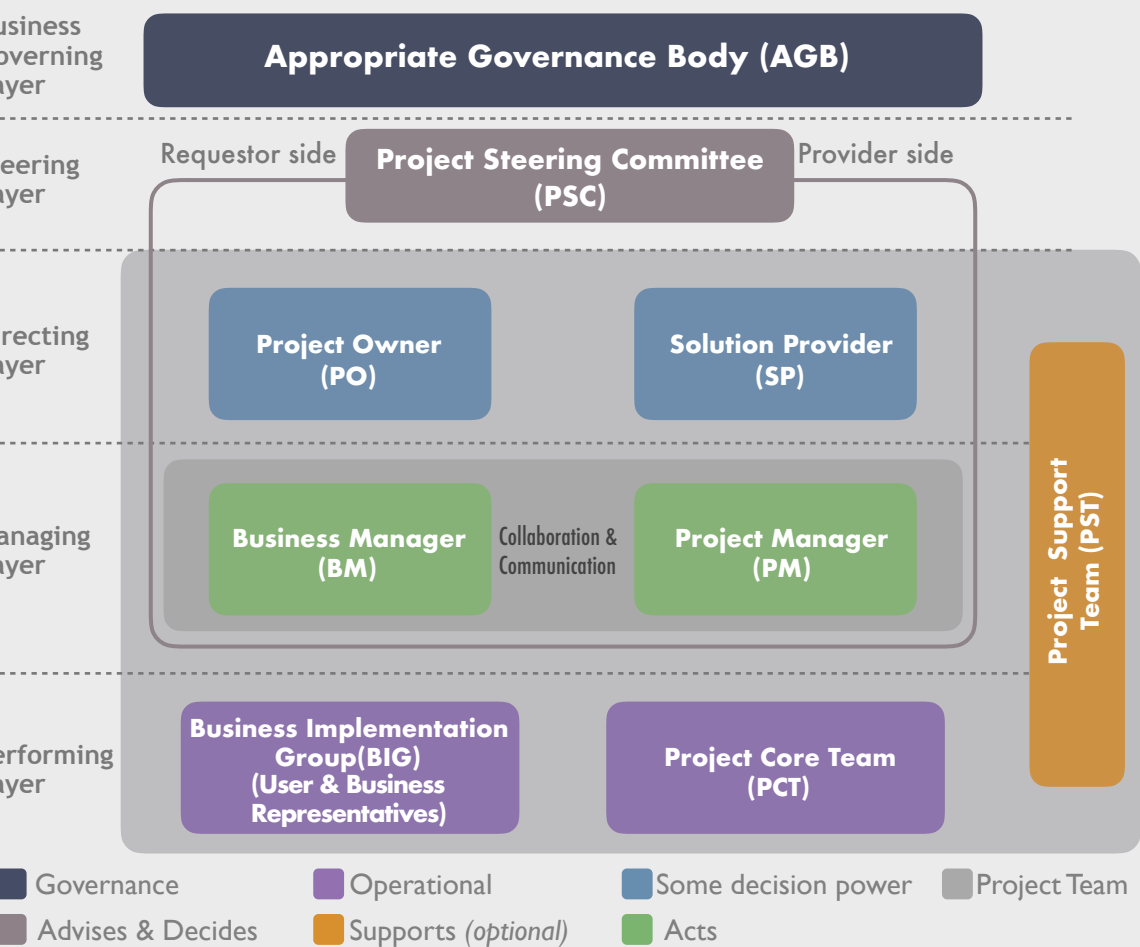
- **A Project Governance Model (i.e. roles & responsibilities)** One of the pillars of good management is governance. Governance provides the framework within which project management decisions are made. It defines all standard project management roles and their associated responsibilities while describing escalation and reporting lines.
- **A Project Lifecycle (i.e. project phases)** The PM² Methodology defines four project management phases. This is an effective way to group the many management activities that take place during a project, and to focus the attention of the project team in those activities that are necessary during that period of time. The decision to move from one phase to the next is taken during a relevant Phase Gate and depends on whether the goals of that phase has been satisfactorily achieved.
- **A set of Processes (i.e. project management activities)** The PM² Methodology defines a set of project management processes and activities which are carried out throughout the life of the project, and in most cases, are executed in an iterative manner. The management processes are detailed in the 6 PM² management plans and in the Monitor & Control process group.
- **A set of Project Artefacts (i.e. templates and guidelines)** The PM² Methodology proposes the creation of a set of Artefacts that facilitate the definition, management and communication of projects. PM² offers a complete set of project templates and detailed guidelines on how to use them.
- **A set of Mindsets (i.e. effective beliefs and behaviours)** The PM² Mindsets are the attitudes and behaviours that help project teams focus on what is really important to achieve the project's goals. Together they help navigate the complexities of managing projects in Organisations and make the PM² Methodology both more effective and complete.

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# THE PM<sup>2</sup> PROJECT ORGANISATION



# THE PM<sup>2</sup> PROJECT ROLES

**Appropriate Governance Body (AGB)** The AGB provides top-level governance for all projects.

**Project Owner (PO)** The PO represents the business side of the project, chairs the PSC, and is accountable for the overall project success. The PO typically holds a management role in the functional organisation.

**Business Manager (BM)** The BM represents the PO in the day-to-day management of the project. Works closely with the PM and coordinates the BIG.

**Business Implementation Group (BIG)** The BIG represents the needs and interests of the users and ensures that project specifications and deliverables meet the needs of users. They also implement the business changes required for the organisation to effectively integrate the project deliverables and realise the intended benefits.

**Project Steering Committee (PSC)** The PSC steers the project and provides high-level monitoring and controlling. The PSC signs off all key management artefacts and drives change in the organisation.

**Solution Provider (SP)** The SP assumes the accountability for project work and deliverables. The SP typically holds a management role in the functional organisation.

**Project Manager (PM)** The PM manages the project and assumes responsibility for the project and project management work and deliverables.

**Project Core Team (PCT)** The PCT produces the project deliverables and plays a key role in the planning and the successful completion of the project.

**Project Support Team (PST)** The PST consists of those roles and groups that will support the PM during the project.

**Project Steering Committee (PSC)**

The Project Drivers differ from phase to phase within the PM<sup>2</sup> project lifecycle. The Project Owner (PO) is the main driver during the initiation of the project and the Project Manager (PM) drives the planning phase.

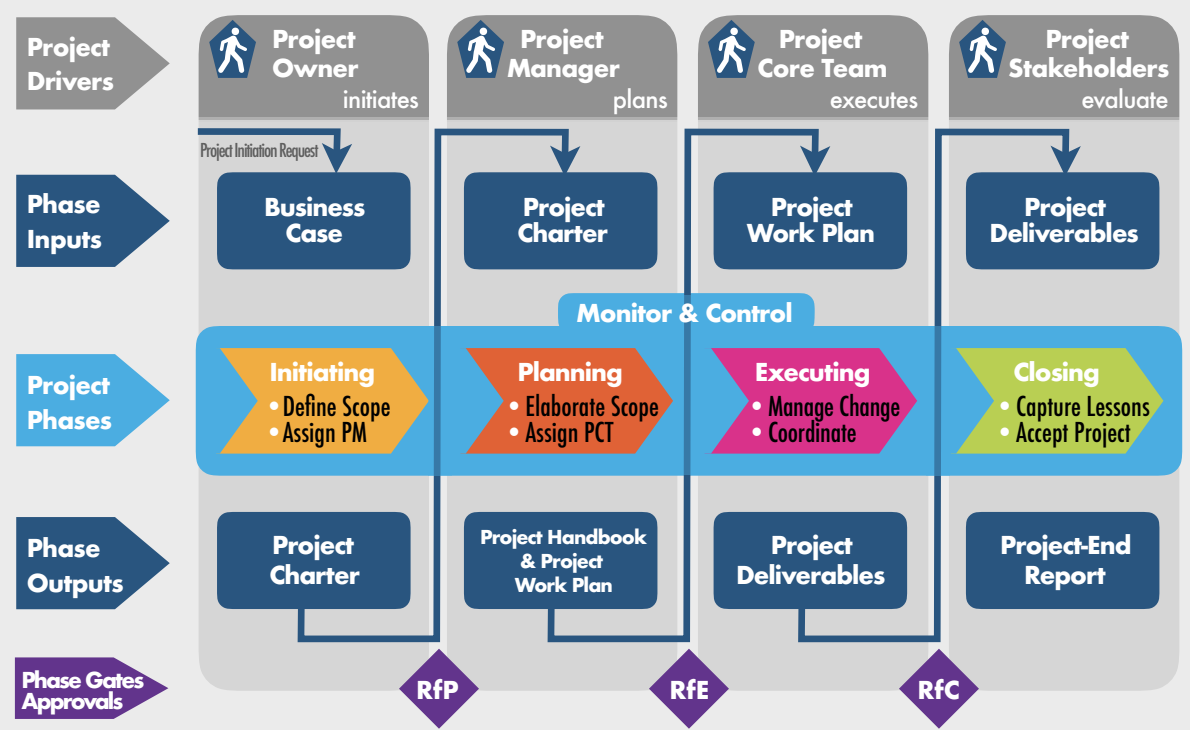
The Project Core Team (PCT) drives the execution of the project plan and the creation of the project deliverables while the Project Stakeholders are designated as the main driver of the closing phase.

Project Phases	
<b>Initiating</b>	Define initial scope, create the Business Case and Project Charter.
<b>Planning</b>	Elaborate scope, create the PM Plans and assign the Project Core Team.
<b>Executing</b>	Execute the plan, manage communications and create the project deliverables.
<b>Closing</b>	Transfer product ownership and report on the project's performance (Project-End Report).
<b>Monitor &amp; Control</b>	Monitor project variables, measure progress, manage changes and identify actions to address risks and issues.

Phase Gates / Approvals	
<b>RfP</b>	Ready for Planning
<b>RfPE</b>	Ready for Executing
<b>RfC</b>	Ready for Closing

# PHASES, DRIVERS, KEY ARTEFACTS AND ACTIVITIES

Phase Inputs and Outputs	
<b>Project Initiation Request</b>	Formalises the project and captures the project concept.
<b>Business Case</b>	Captures the reasoning for the project, provides justification and establishes the budgetary constraints.
<b>Project Charter</b>	Presents an overview scope statement and the high-level project requirements, and management approach.
<b>Project Handbook</b>	Presents the project management objectives, the overall management approach and rules, and documents the roles and responsibilities.
<b>Project Work Plan</b>	Organises the work needed to achieve the project scope. Includes the Work Breakdown, the Effort & Cost Estimates and the Project Schedule.
<b>Project Status Reports</b>	Present the project progress to the relevant stakeholders, based on the performance of key project metrics
<b>Project Deliverables</b>	The complete set of project deliverables as defined in the project plans. These are evaluated before their final acceptance.
<b>Project-End Report</b>	Summarizes and documents the project experience, the project performance, the lessons learned (successful practices or pitfalls) and any post-project recommendations.



INITIATING	PLANNING	EXECUTING	CLOSING
<b>ACTIVITIES</b> <ul style="list-style-type: none"> <li>Document the idea/need</li> <li>Identify key stakeholders (and their needs)</li> <li>Create a business justification for the project</li> <li>Define the project scope and organisation</li> </ul>	<b>ACTIVITIES</b> <ul style="list-style-type: none"> <li>Organise a Kick-off Meeting</li> <li>Tailor the PM<sup>2</sup> process</li> <li>Assign roles &amp; responsibilities</li> <li>Elaborate project scope</li> <li>Develop work breakdown &amp; project schedule</li> <li>Develop project plans</li> <li>Distribute plans to stakeholders</li> </ul>	<b>ACTIVITIES</b> <ul style="list-style-type: none"> <li>Organise a Kick-off Meeting</li> <li>Coordinate project execution</li> <li>Conduct Meetings</li> <li>Assure quality</li> <li>Create project reports</li> <li>Distribute information</li> <li>Ensure deliverables acceptance</li> </ul>	<b>ACTIVITIES</b> <ul style="list-style-type: none"> <li>Organise a Project-End Review Meeting</li> <li>Capture lessons learned and post-project recommendations</li> <li>Get final project acceptance</li> <li>Release project resources</li> <li>Archive project information</li> </ul>
<b>ARTEFACTS</b> <ul style="list-style-type: none"> <li>Project Initiation Request</li> <li>Business Case</li> <li>Project Charter</li> <li>Project Logs (setup)</li> </ul>	<b>ARTEFACTS</b> <ul style="list-style-type: none"> <li>Planning Kick-off/ MoM</li> <li>Project Stakeholder Matrix</li> <li>Project Handbook                             <ul style="list-style-type: none"> <li>Roles &amp; responsibilities</li> <li>Management plans</li> <li>Requirements management</li> </ul> </li> <li>Outsourcing Plan</li> <li>Project Work Plan</li> <li>Deliverables Acceptance Plan</li> <li>Transition Plan</li> <li>Business Implementation Plan</li> </ul>	<b>ARTEFACTS</b> <ul style="list-style-type: none"> <li>Executing Kick-off Agenda/ MoM</li> <li>Meeting Agendas/MoMs</li> <li>Change Requests</li> <li>Quality Review Report</li> <li>Project Status Report</li> <li>Project Progress Report</li> <li>Deliverables Acceptance Note</li> </ul>	<b>ARTEFACTS</b> <ul style="list-style-type: none"> <li>Project-End Review Agenda/ MoM</li> <li>Project-End Report                             <ul style="list-style-type: none"> <li>Lessons Learned</li> <li>Best Practices</li> <li>Post Project Recommendations</li> </ul> </li> <li>Project Acceptance Note</li> </ul>

MONITOR & CONTROL			
<b>ACTIVITIES</b> <ul style="list-style-type: none"> <li>Monitor Project Performance</li> <li>Control Schedule</li> <li>Control Cost</li> <li>Manage Stakeholders</li> <li>Manage Requirements</li> <li>Manage Project Change</li> <li>Manage Risks</li> </ul>	<ul style="list-style-type: none"> <li>Manage Issues and Decisions</li> <li>Manage Quality</li> <li>Manage Deliverables Acceptance</li> <li>Manage Transition</li> <li>Manage Business Implementation</li> <li>Manage Outsourcing</li> </ul>	<b>ARTEFACTS</b> <ul style="list-style-type: none"> <li>Risk Log</li> <li>Issue Log</li> <li>Decision Log</li> <li>Change Log</li> <li>Project Work Plan</li> <li>Requirements Document</li> </ul>	<b>Checklists</b> <ul style="list-style-type: none"> <li>Phase-exit Review checklist</li> <li>Quality Review checklist</li> <li>Deliverable Acceptance checklist</li> <li>Transition checklist</li> <li>Business Implementation checklist</li> <li>Stakeholder checklist</li> </ul>

# RAM (RASCI)

Responsible, Accountable, Supports, Consulted, Informed

Initiating	AGB	PSC	PO	BM	BIG	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	A	C	S	C	S	R	C
Planning	AGB	PSC	PO	BM	BIG	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	I	I	R	I
Risk Management Plan	I	C	A	C	I	I	R	I
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	BIG	SP	PM	PCT
Executing Kick-off Meeting	I	A	C	S/C	C	C	R	C
Project Coordination	I	I	A	S	I	I	R	I
Quality Assurance	I	I	I	S	C	I	A	R
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	BIG	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	BIG	SP	PM	PCT
Project-End Review Meeting	I	A	C	S	C	C	R	C
Project-End Report	I	A	C	S	C	C	R	C
Administrative Closure	I	C	A	C	I	C	R	I

