

PM² Essentials Training Material

Based on PM² v3.0



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Introduction





The European Commission's
Project Management Methodology

This course introduces the PM² Methodology of the European Commission.

It enables participants to:

- obtain the foundation knowledge necessary for using effectively the PM² Project Management Methodology.
- understand the full PM² project life cycle, organization, roles & responsibilities.
- understand the PM² Mindsets.
- Familiarise themselves with the key PM² Artefacts for initiating, planning, executing, controlling and closing projects.

- Introduction
- Project (Management) basics
- PM² Overview
- Project Governance
- PM² Mindset
- Phases and Artefacts

Session 1

- 09:00 **Kick-off**
- 09:15 Project (Management) Basics
- 10:30 Introduction to PM²
- 11:00 **Break**
- 11:15 Governance of Projects
- 11:45 PM² Mindsets
- 12:00 Initiating Phase
- 12:30 **Lunch**

Session 2

- 13:30 Planning Phase
- 14:00 Executing Phase
- 14:30 Monitor & Control
- 15:15 **Break**
- 15:30 Monitor & Control (cont'd)
- 16:15 Closing Phase
- 16:45 **Wrap-up**
- 17:00 **End course**

Contact the CoEPM² Team



Alain Van Gaevel, HoS Management Support Services
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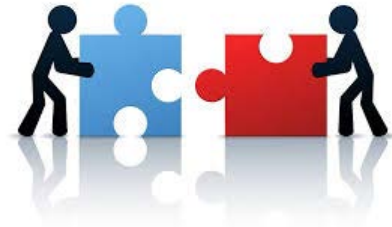
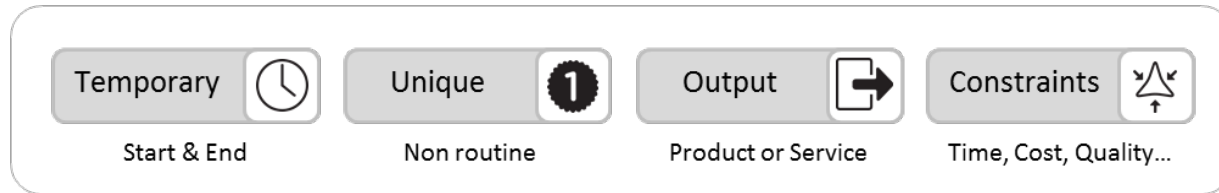
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EC-PM2@ec.europa.eu

Project (management) Basics

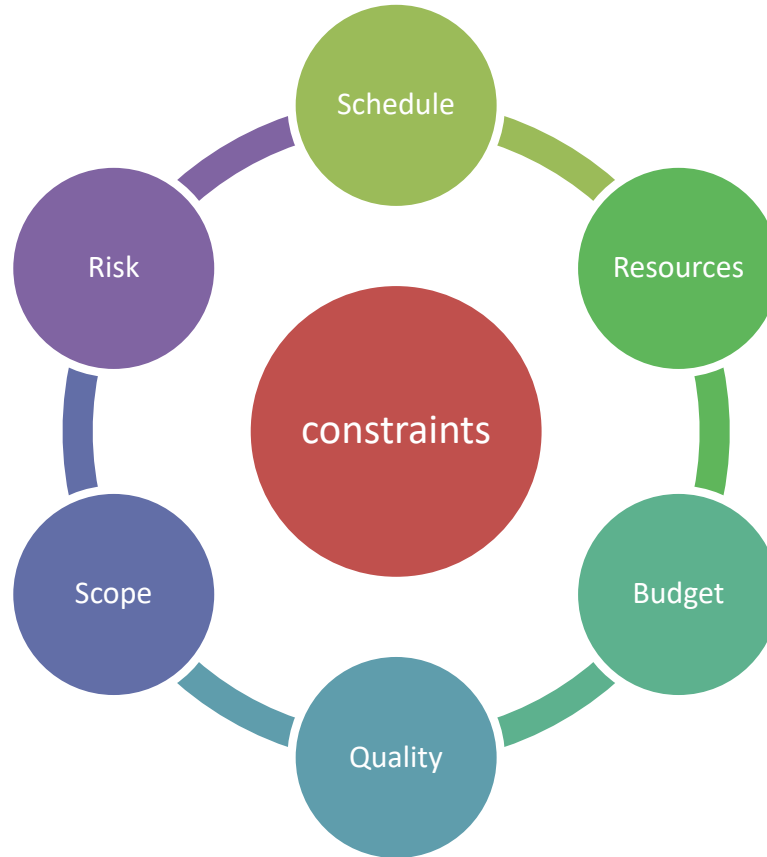


What is a Project?

- A project is a temporary organisational structure which is set up to create a unique product or service (output) within certain constraints (such as time, cost, and quality).



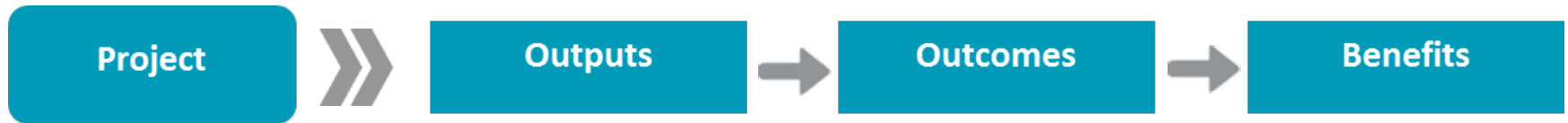
Constraints of a Project



Project Outputs, Outcomes, Benefits

Project deliverables or outputs are merely a means to an end.

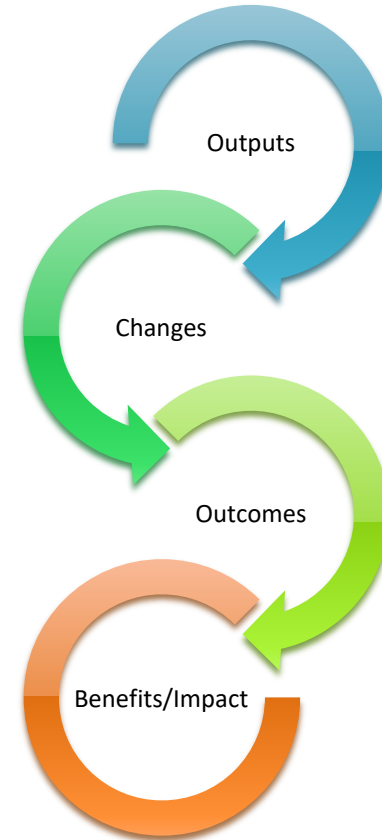
The real purpose of a project is to achieve certain outcomes. The measurable contribution towards strategic objective are considered the benefits of the project.



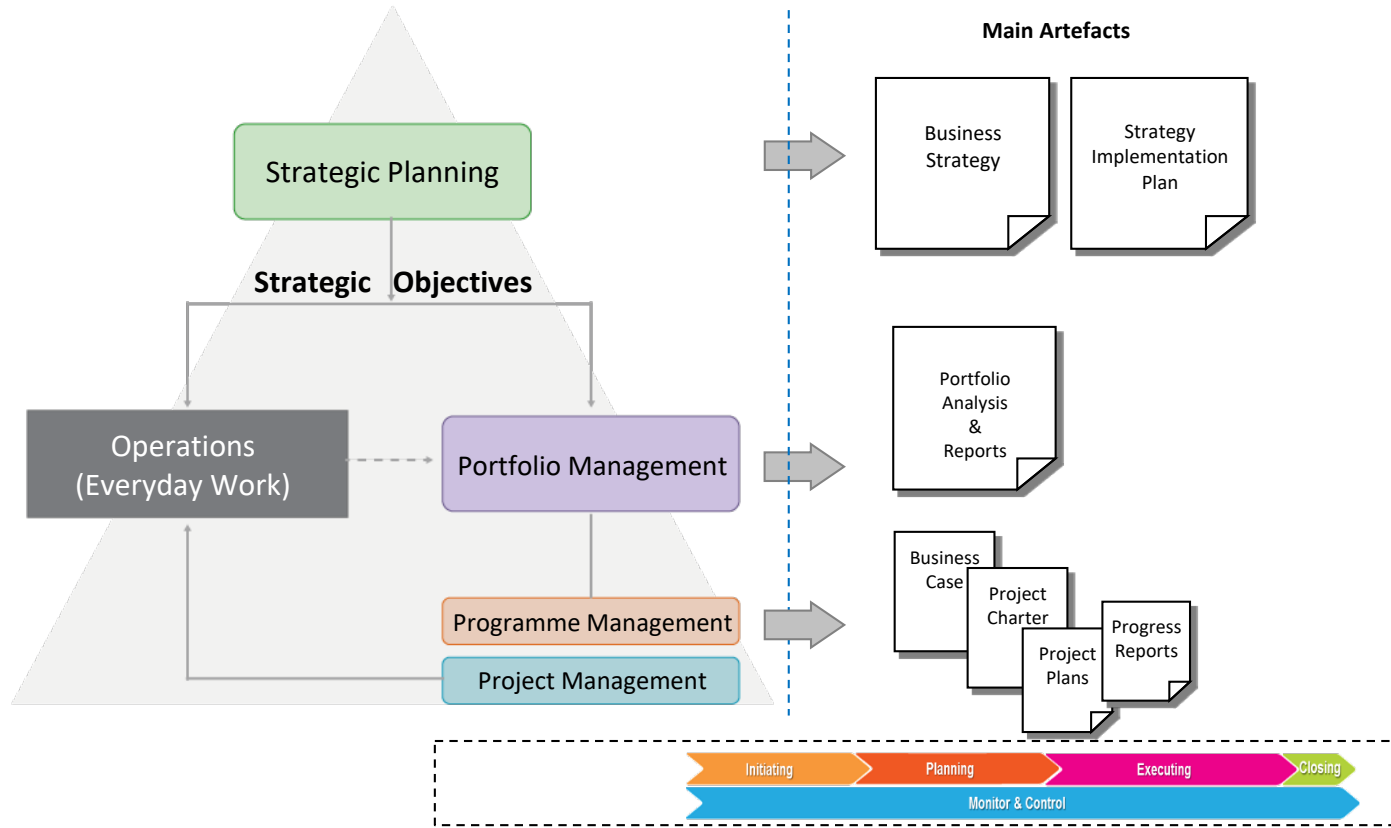
Note that project outcomes and benefits are often realized only after the project has closed

Why do we do Projects?

- Projects deliver Outputs (deliverables) that deliver a change (social, commercial, operational...)
- These changes generate outcomes for the beneficiaries or users.
- On the long term these outcomes produce benefits or impact.
- These benefits realize or support the organisation strategy.



Portfolio, Programme, Project Relationship



- Projects are undertaken at all levels of the organization and they can involve a single person or many thousands.
- Their duration ranges from a few weeks to several years. Projects can involve one or many organizational units.
- Developing a new product or service
- Effecting a change in structure, staffing, or style of an organization
- Designing a new transportation vehicle
- Developing, modifying or acquiring a new information system
- Constructing a building or facility
- Building a water system for a community
- Running a campaign for political office
- Implementing a new business procedure or process
- Responding to a contract solicitation.

People Competences	Perspective Competences
<ul style="list-style-type: none">• Self-reflection and self-management• Personal integrity and reliability• Personal communication• Relationships and engagement• Leadership• Teamwork• Conflict and crisis management• Resourcefulness• Negotiation• Results orientation	<ul style="list-style-type: none">• Strategy• Governance, structures and processes• Compliance, standards and regulations• Power and interest• Change and transformation• Culture and values <p data-bbox="1286 856 1647 885">Source: IPMA-ICB (adapted)</p>

A word cloud of virtues. The words are arranged in a roughly circular pattern. The largest words are "Insightfulness", "Magnificence", "Temperance", "Calmness", and "Self-knowledge". Other words include "Friendliness", "Prudence", "Fairness", "Humour", "Generosity", "Honour", "Judgement", "Courage", and "Magnanimity".

Insightfulness
Magnificence
Friendliness
Fairness Humour
Temperance
Prudence Generosity Honour
Judgement
Calmness Courage Magnanimity
Self-knowledge

PM² Overview

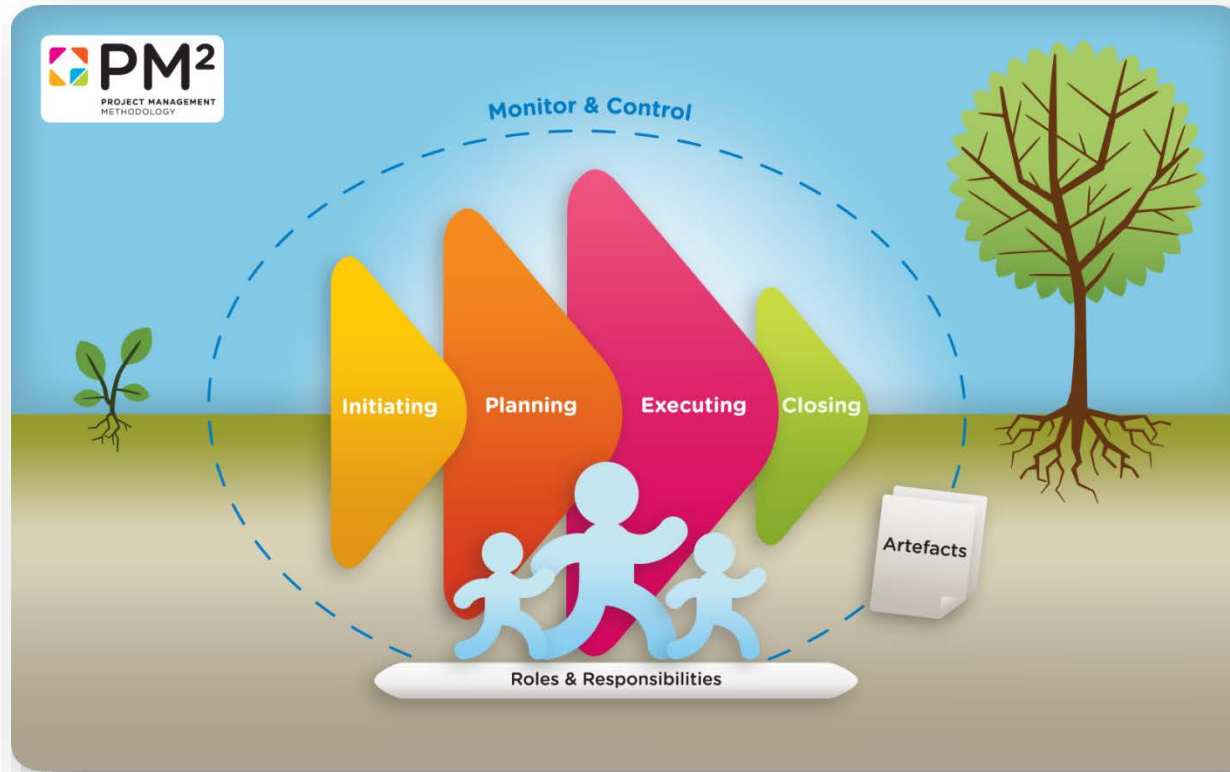


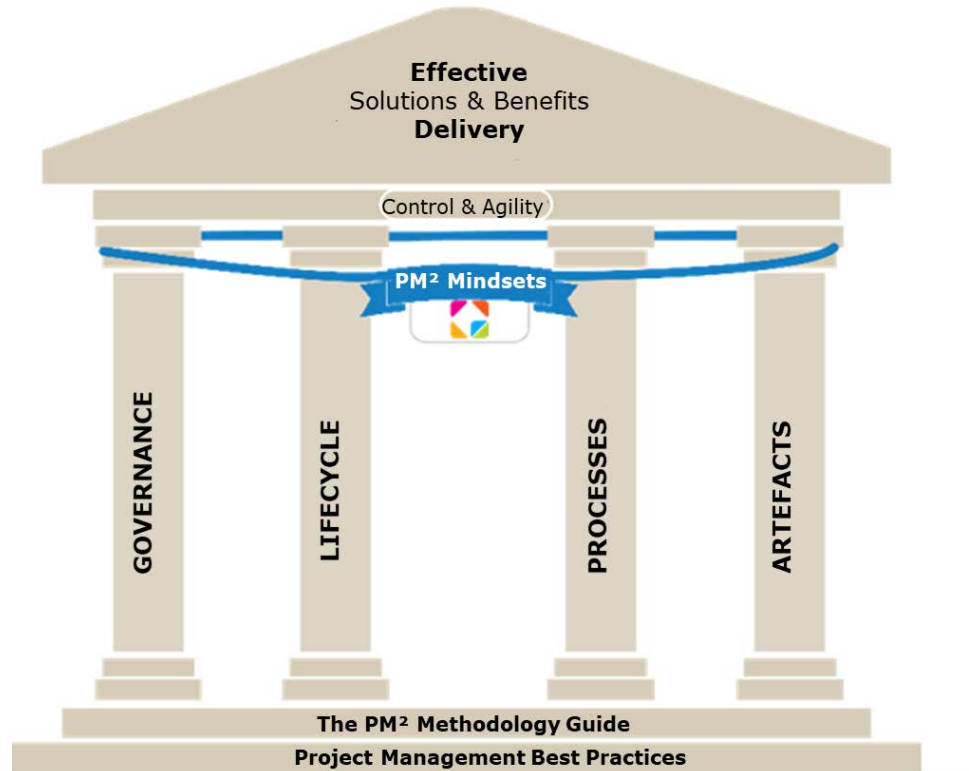
The Purpose of PM²

- The purpose of PM² is to enable Project Managers to deliver solutions and benefits to their organisation and customers through the effective management of project work.



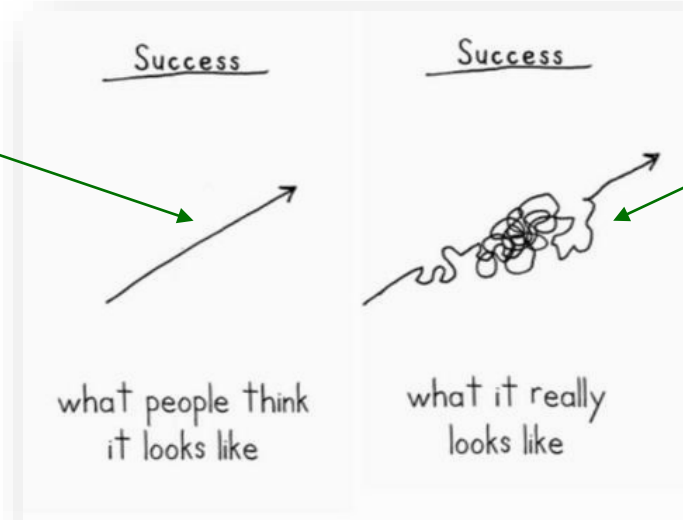
The PM² Methodology





The PM² Mindsets enable us to apply the Methodology more effectively and help us navigate through the complexities of project reality.

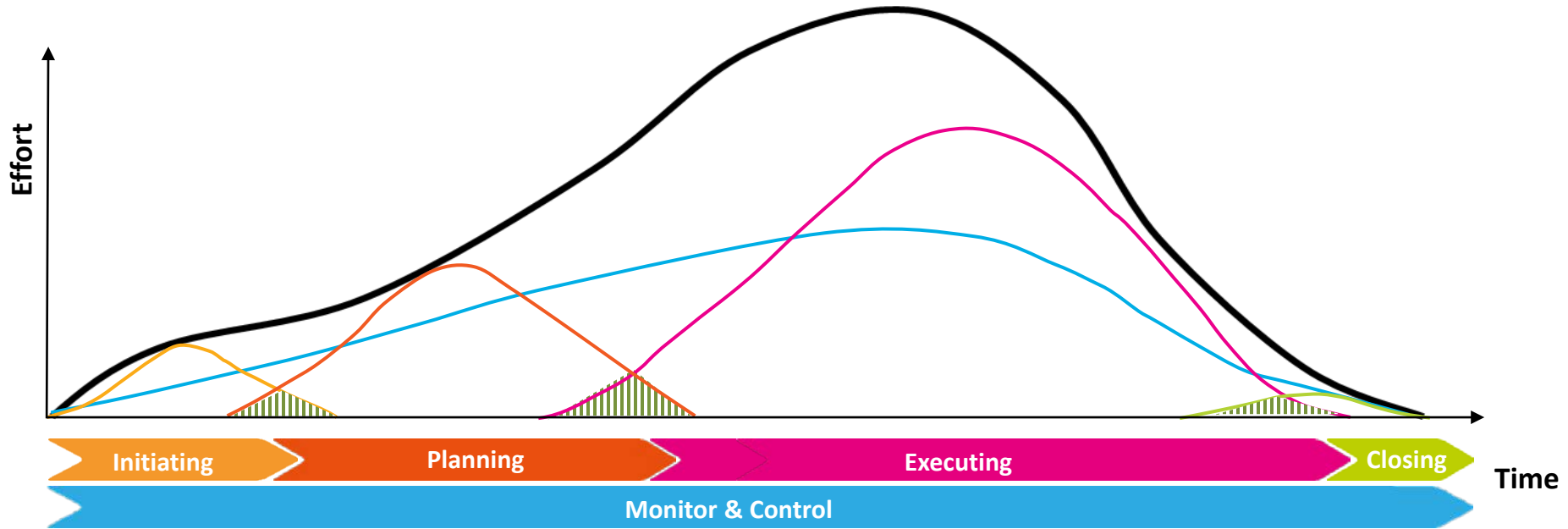
PM²
Processes



PM²
Processes & Mindsets



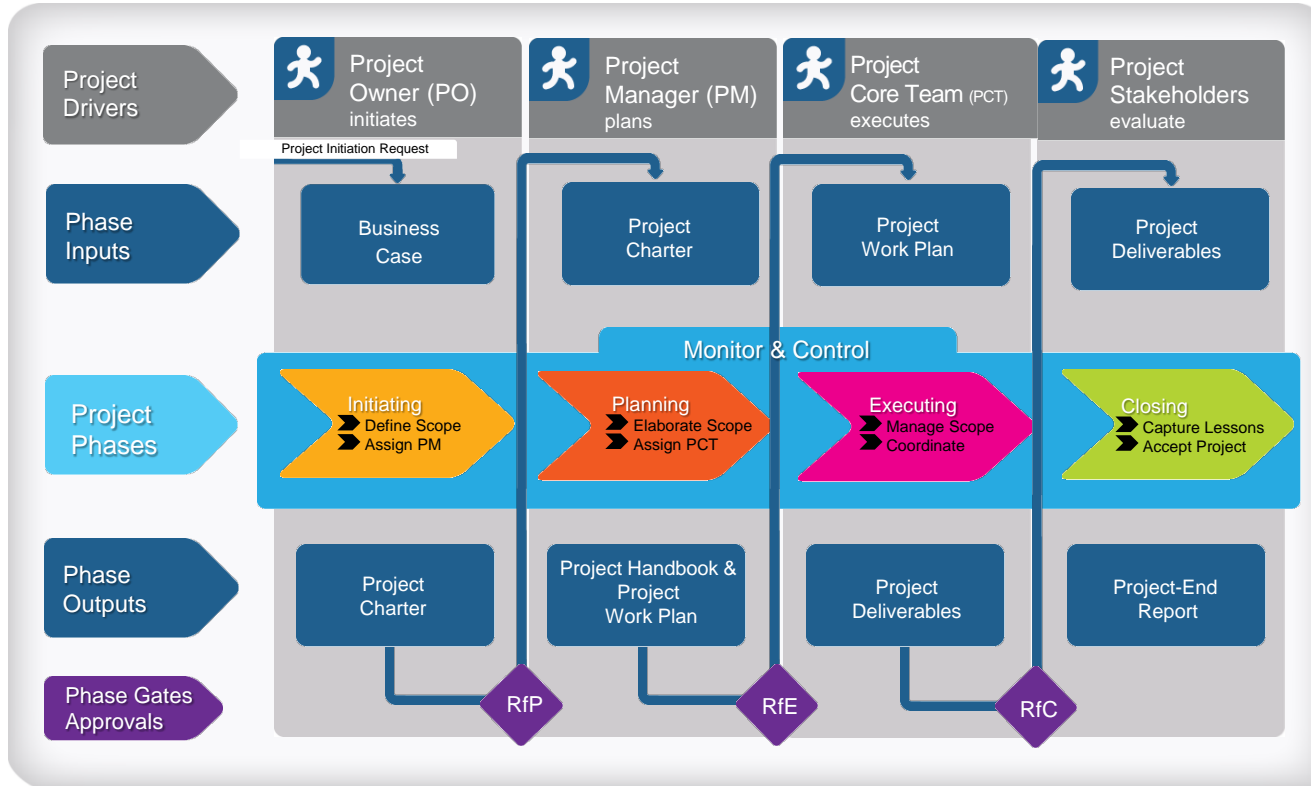
PM² Project Lifecycle



PM ² Phases		Description
1	Initiating	Get the project off to a good start.
2	Planning	Define products, verify the Business Case, plan work...
3	Executing	Create the project's products.
4	Closing	User acceptance, handover to maintenance...
Monitor & Control: The Project Manager (PM) monitors & controls the work, risks, issues, quality, etc. throughout the whole project lifecycle.		



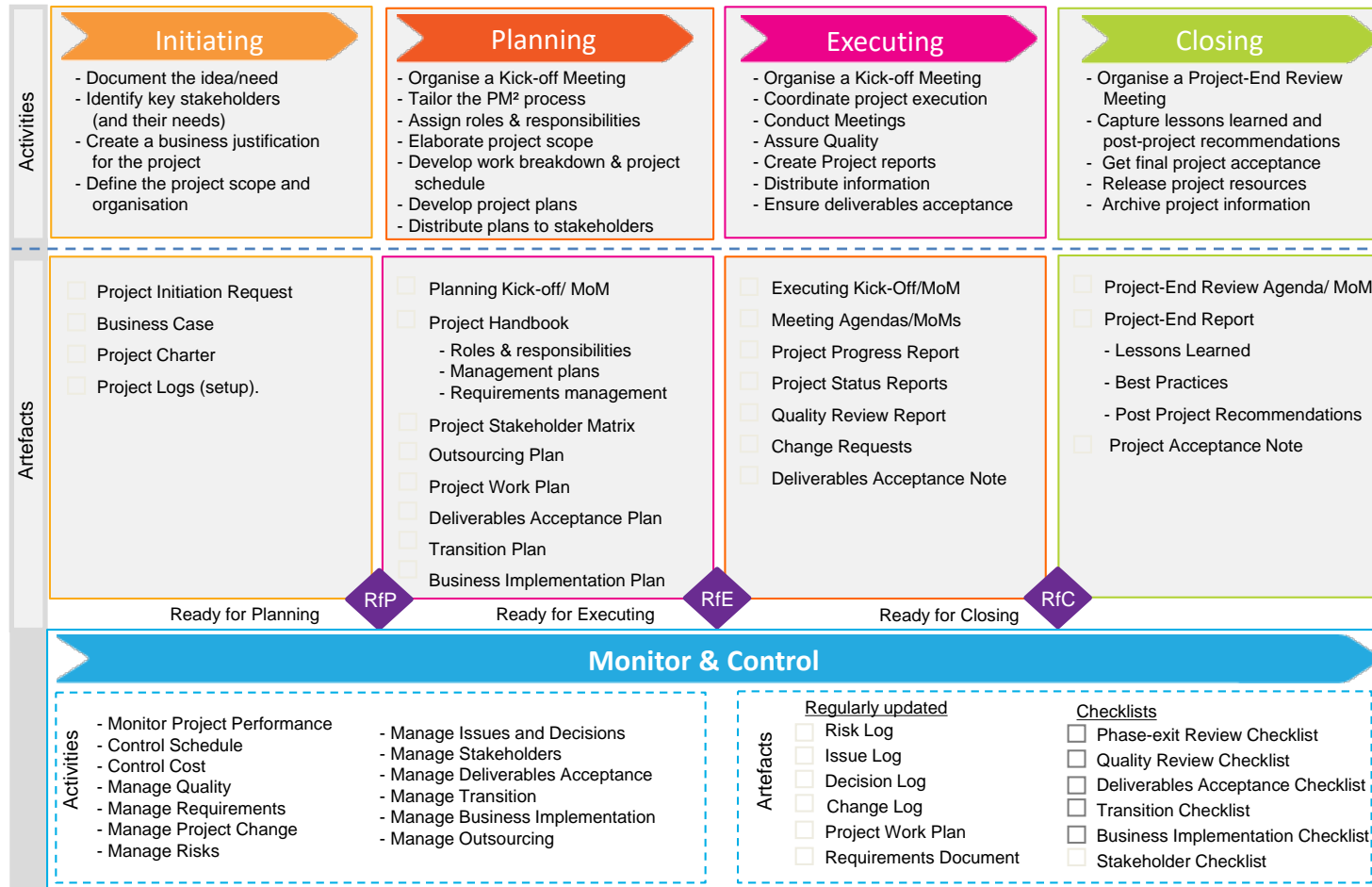
PM² Project Lifecycle - Phases & Drivers



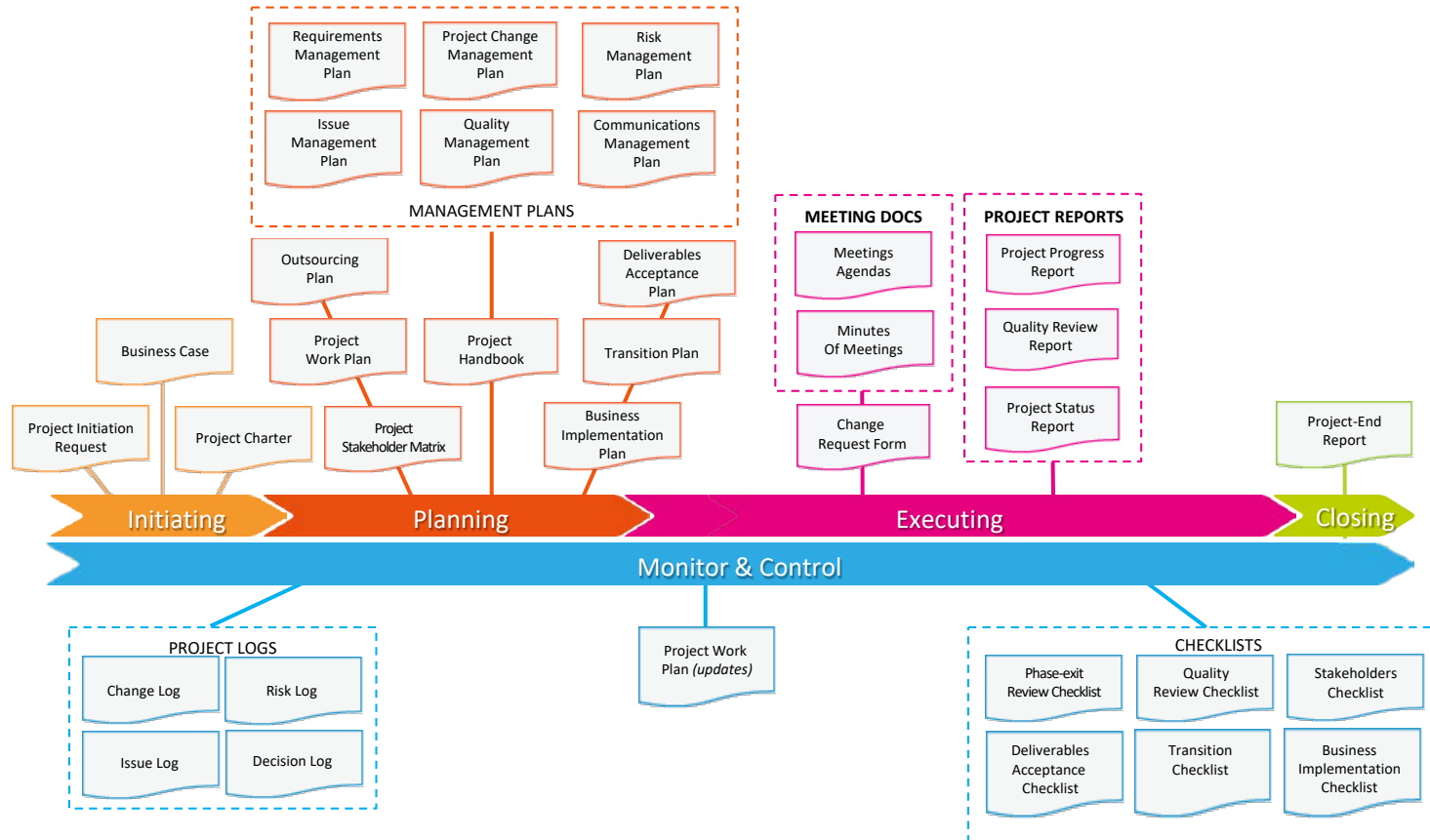
- These check points contribute to the overall project management quality.
- The three PM² (approval) Phase Gates are:
 - RfP (Ready for Planning): At the end of the Initiating Phase
 - RfE (Ready for Execution): At the end of the Planning Phase
 - RfC (Ready for Closing): At the end of the Executing Phase



PM² Phases & Artefacts



The PM² Artefacts Landscape



- First, **understand** purpose and value of the methodology
- Don't cut, but **customize**
- **Balance** control gained against effort required
- Eliminate waste, but **respect** the integrity of the method

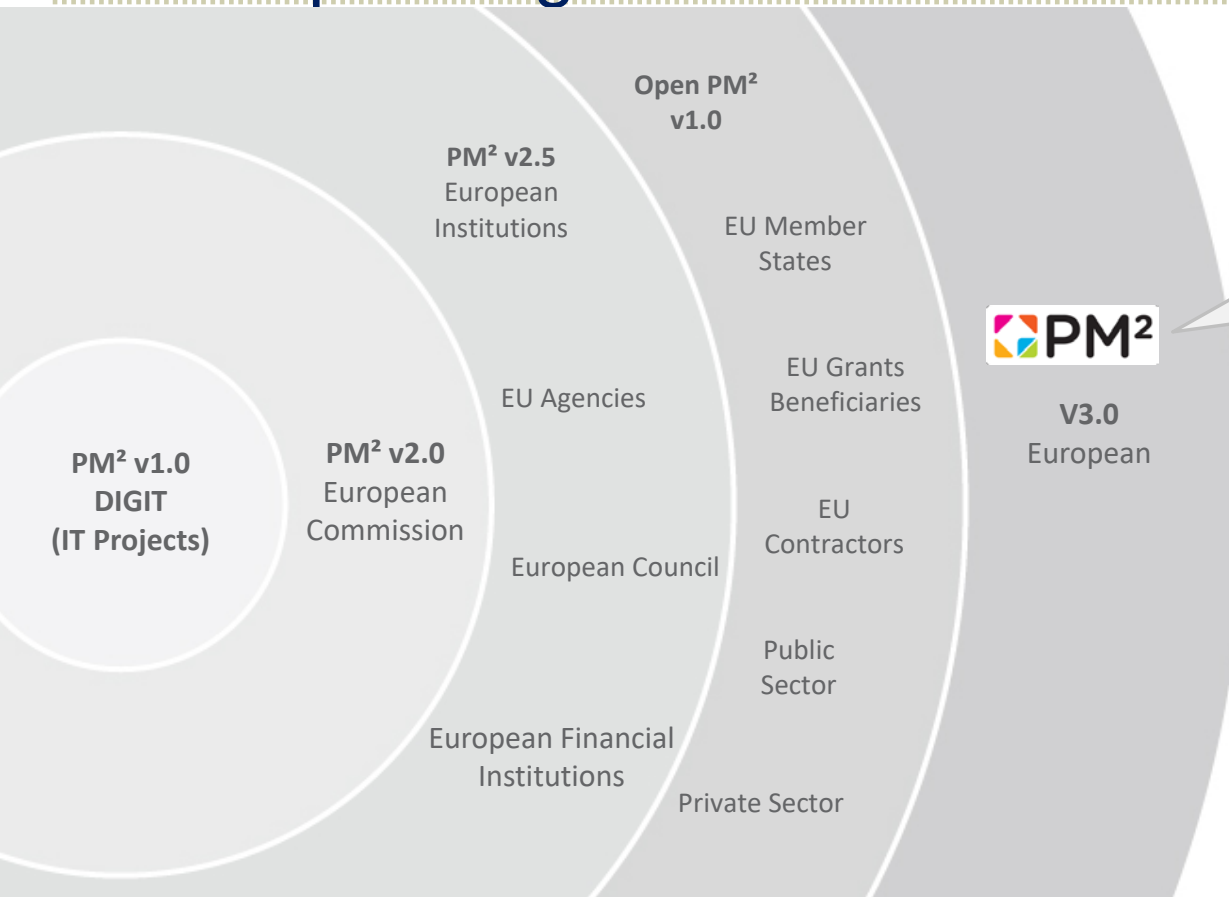


The purpose of documentation is to...

- Help people think something through
- Provide a clear picture of the project requirements.
- Facilitate communication.
- Facilitate agreement by all project stakeholders.
- Offer a baseline for the monitoring & controlling.
- Document important decisions made (and track changes).
- Respond to Audit requirements.
- Integrate new-team members.
- Support organizational memory.
- Support maintenance



The Expanding Reach of PM²



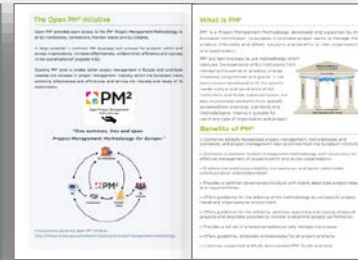
Europe & the World



V3.0
European



The PM² Guide – V3.0



The PM² Project Management Methodology Guide v3.0

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Project Governance



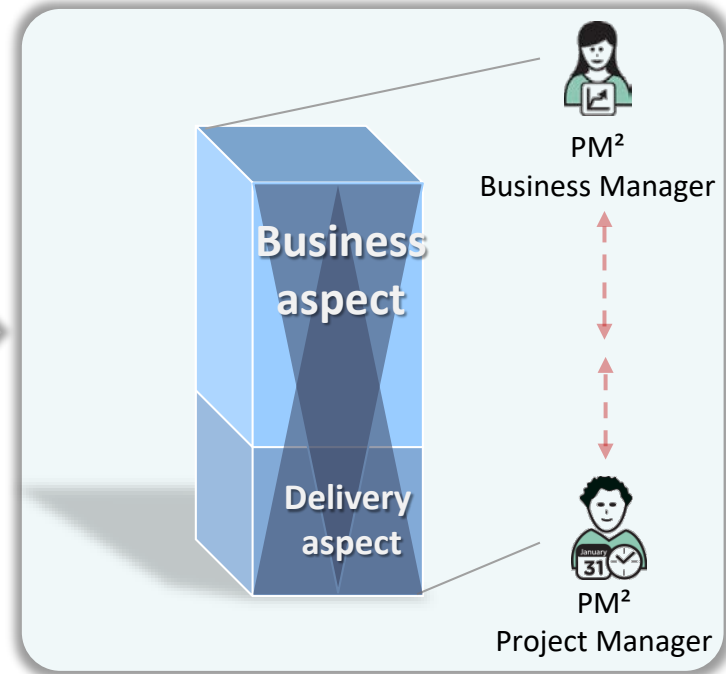
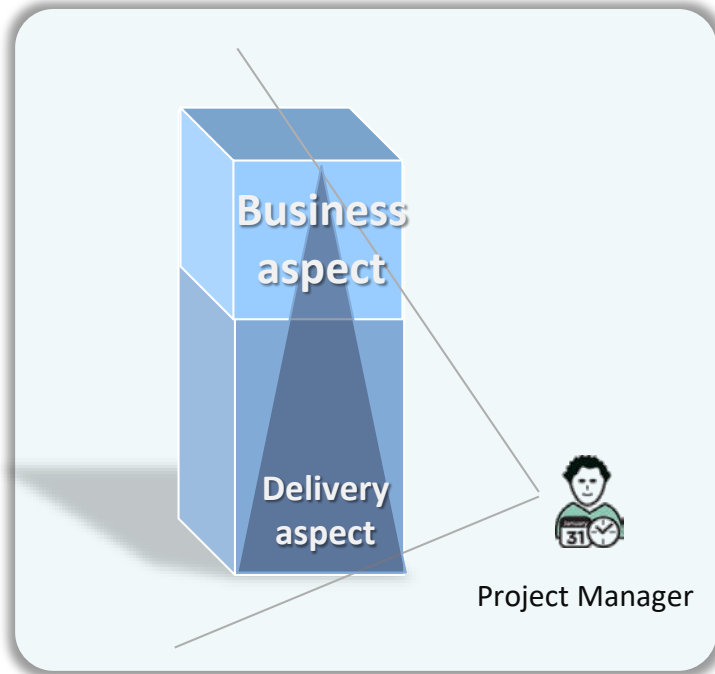


- Is (above all) a project (i.e. not operations, not a work activity, not a programme etc.).
- has a duration of more than 4–5 weeks and involves more than 2–3 people.
- runs within an organisation and can be subject to internal or external audits.
- requires a clearly defined governance structure and clearly assigned roles and responsibilities.
- requires approval of its budget and scope.
- includes more than just construction/delivery activities.
- includes transition and business implementation activities.
- requires a certain level of documentation, transparency and reporting.
- requires a certain level of control and traceability.
- has a broad base of internal (and external) stakeholders
- may require the collaboration of several organisations or organisational units.
- Contributes to raising the organisation's project management maturity.

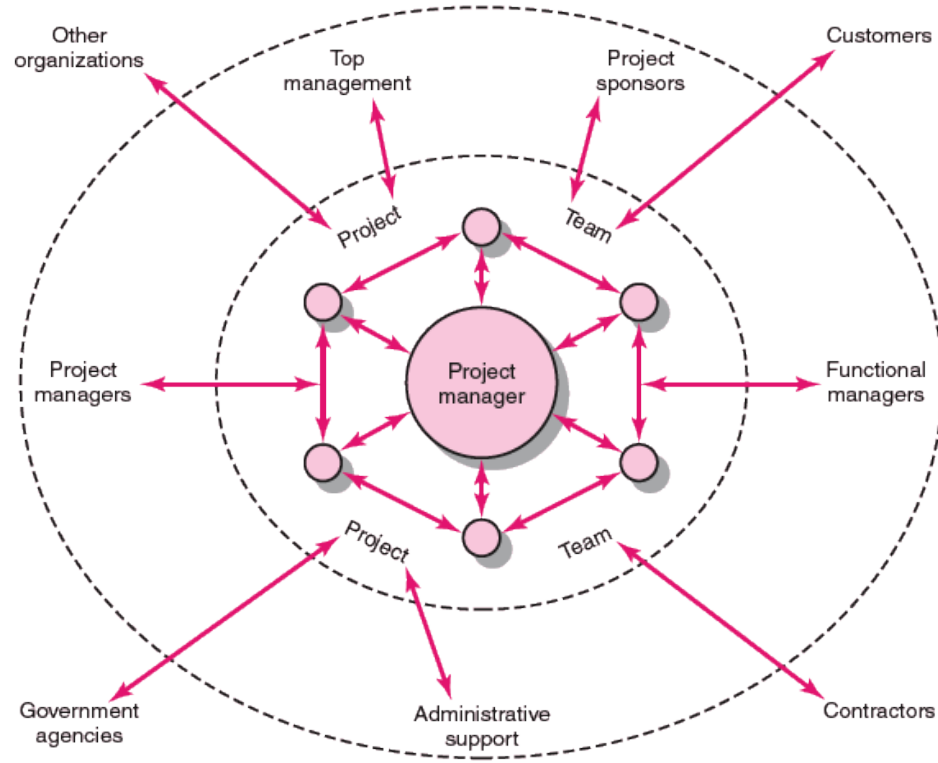
A Shift in Perspective

Pure Project Perspective
(work-centric)

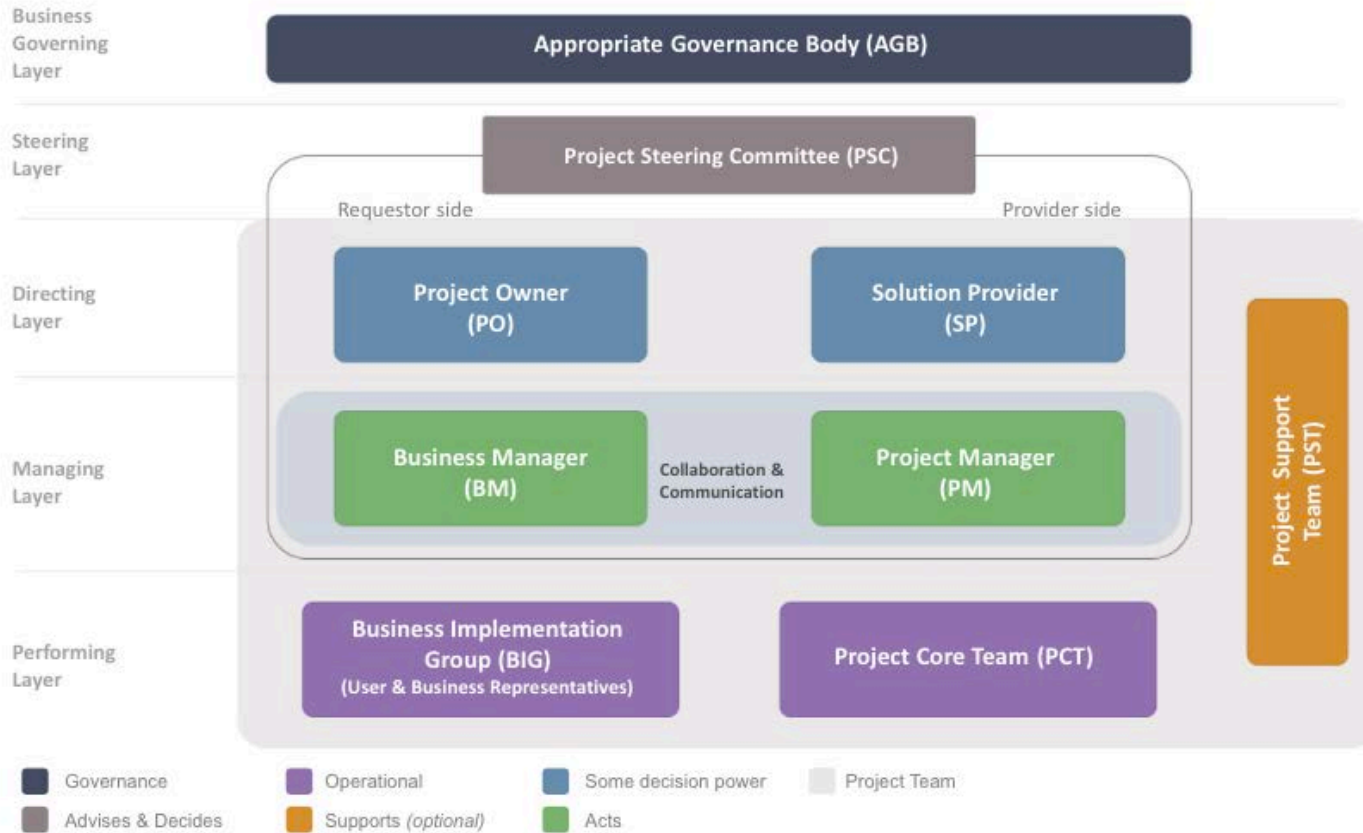
Holistic View
(value centric)



...a Network of Stakeholders



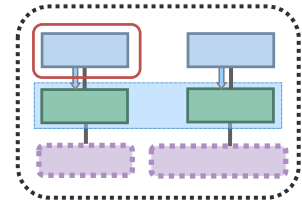
The PM² Governance Model



The Project Owner (PO) Role



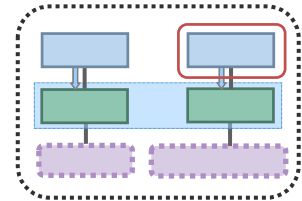
- Acts as the project sponsor
- Chairs the Project Steering Committee (PSC)
- Accepts the business objectives
- Owns project business risks
- Monitors project progress regularly (*high level*)
- Mobilises resources (a.k.a. budget)
- Provides leadership and strategic direction
- Assures that project outcomes are in line with the business objectives
- Approves all key management Artefacts



The Solution Provider (SP) Role



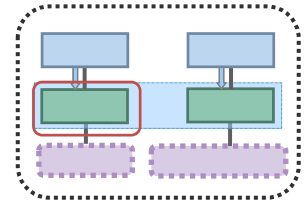
- Assumes the overall accountability for project deliverables/services requested by the Project Owner (PO)
- May help the Project Owner (PO) to establish the Business Case and objectives for the project
- Represents the interests of those designing, developing, facilitating, procuring, implementing, and possibly operating and maintaining the project output (e.g. IT System)
- Agrees on objectives for the provider activities and approves the Contractors' deliverables for the project
- Mobilises the needed resources from the provider side and appoints the PM



The Business Manager (BM) Role

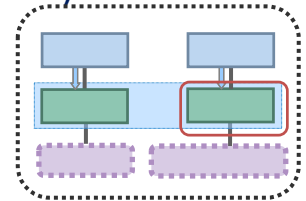


- Acts on a daily basis on behalf of the Project Owner (PO)
- Drives the definition of business and project objectives
- Manages the business activities of the project and coordinates the User Representatives
- Leads the implementation of the business changes as defined by the project
- Ensures that the client organisation is ready to accommodate and use the final project outputs
- Ensures that the Project outputs produce the expected results (outcomes and benefits)

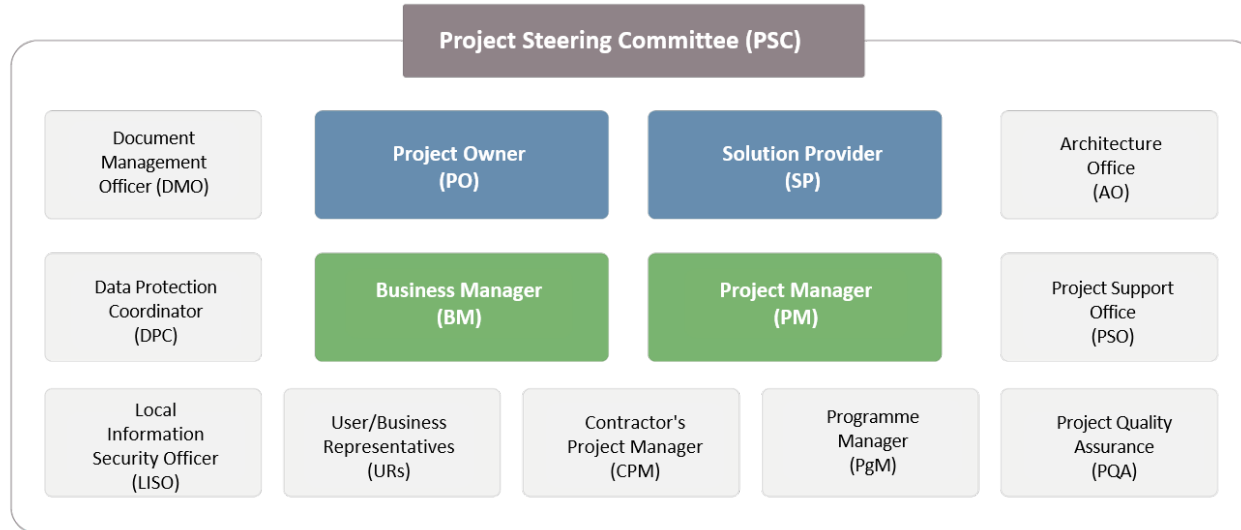


The Project Manager (PM) Role

- Assumes responsibility for project deliverables
- Proposes and executes the project plans as approved by Project Steering Committee (PSC)
- Daily manages and coordinates the Project Core Team (PCT) activities and resources
- Ensures that project objectives are achieved within the quality, time, and cost objectives
- Manages stakeholder's expectations
- Ensures that all key management artefacts are delivered and approved by the Project Owner (PO)
- Communicates and reports project progress to the Project Steering Committee (PSC)
- Performs risk management for project related risks (non-business)
- Ensures the interoperability and integration of the different project related deliverables, systems, services and applications



Project Steering Committee (PSC)



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 Work Plan	I	A	C	S/C	C	C	R	S/C
Deliverables Acceptance Plan	I	A	C	S	C	C	R	C
Transition Plan	I	A	C	C	C	I	R	C
Business Implementation Plan	I	I	A	R	C	I	R	C
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

PM² Artefacts & Activities Overview RAM (RASCI)

Steering Committee:
accountable for the Work Plan?

Project owner:
almost full accountability

Project Manager:
does the work but is NOT accountable

- The PM² Governance – Roles & Responsibilities
- The Project Steering Committee (PSC)
- The Project Core Team (PCT)
- Differences between Project Mode and Service Mode
- The Responsibility Assignment Matrix - RAM (RASCI)



PM² Mindsets



The PM² Mindsets



Apply PM² best practices to manage their projects.



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



Maintain an outcomes orientation in relation to all projects and project management activities.



Are committed to delivering project results with maximum value rather than just following plans.



Foster a project culture of collaboration, clear communication and accountability.



Assign project roles to the most appropriate people for the benefit of the project.

The PM² Mindsets are reminders of effective behaviors and attitudes. They provide a common set of beliefs and values for all PM² teams, helping them navigate through the complexities of project reality.



Balance in the most productive way the often-conflicting project management “Ps” of:
product, purpose, process, plan, people, pleasure/pain, participation, perception and politics.



Invest in developing technical and behavioural competences to become better project contributors.



Involve project stakeholders in the organisational change needed to maximise project benefits.



Share knowledge, actively manage Lessons Learned, and contribute to the improvement of project management within their organisations.



Draw inspiration from the PM² Guidelines on Ethics and Professional Virtues.

PM² Mindsets: IAQs (Questions for the Brave!)



Project Managers and Project Teams who practice PM² also ask the important questions:

- **Do we know what we are doing?**
 - Tip: Develop a clear and shared project vision. Manage the project using a holistic approach and optimise the whole project, not just parts of it. Follow a process but stay Agile 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.
- **Are the right people involved?**
 - Tip: People make projects work. The primary criterion for involving people and assigning project roles should be to serve the needs and objectives of the project, and not politics, friendship, functional hierarchy, proximity or convenience.
- **Do we know who is doing what?**
 - Tip: Know what you should be doing, and make sure others know what they should be doing. Is it clear to everyone? Clearly define and understand roles, responsibilities and accountabilities.
- **Deliver at any cost or risk?**
 - Tip: Show respect for people's work and organisational funds and avoid high-risk behavior 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

... and then ask some more important questions:

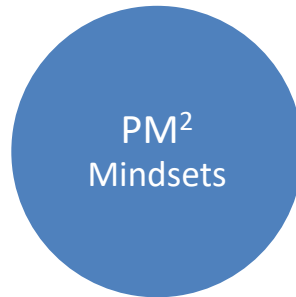
- **Is this important?**
 - Tip: Everything is NOT equally important. Identify, and agree on, the project's Critical Success Criteria (CSC), Minimum Viable Product and Critical Success Factors (CSFs), and allocate effort and attention both tactically and strategically for the benefit of both the project and project management goals.
- **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.
- **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 behavior accordingly.
- **Is there life after the project?**
 - Tip: The product (or service) lifecycle has just begun! Make sure you have contributed to its success.

Bringing it all Together: Processes + Mindsets

help us make decisions on trade-offs between project dimensions of **time, cost, scope and quality**



are the **attitudes and behaviours** which help us focus on what is really important in achieving our project goals.



Phases and Artefacts



Initiating Phase



Client need



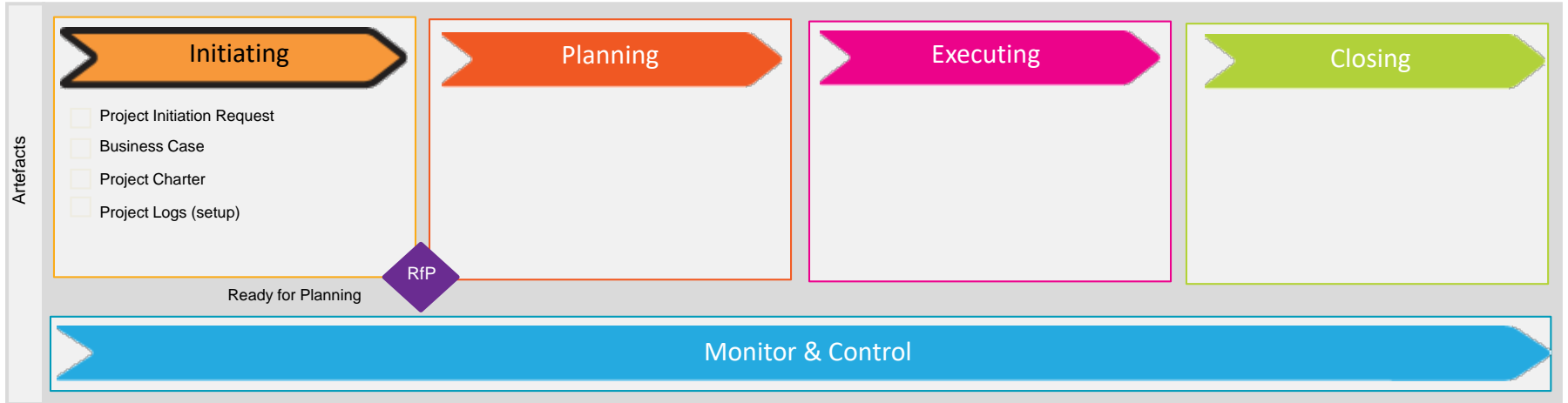
Project Initiation Request



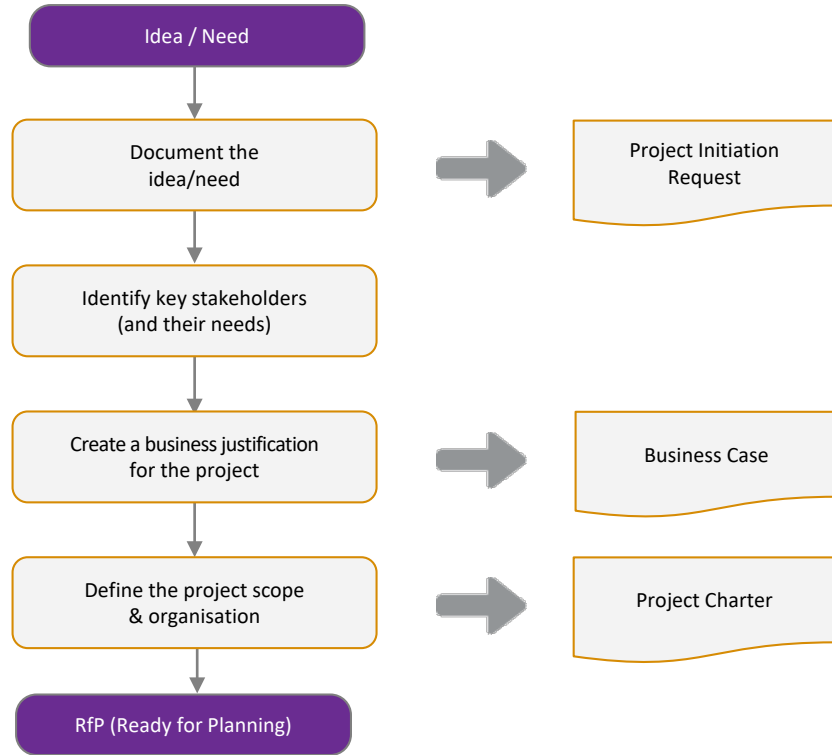
Business Case



Project Charter

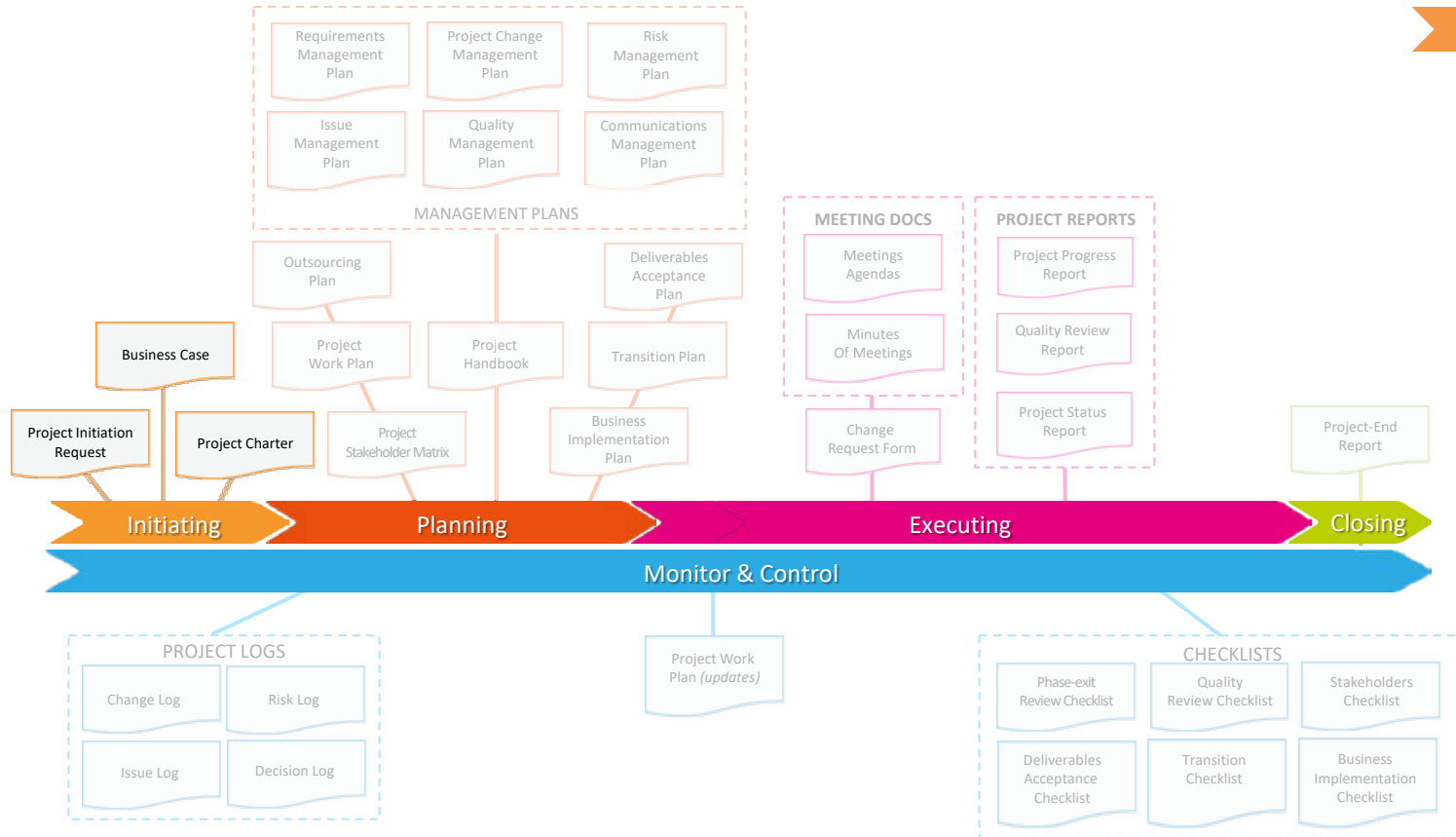


What happens in the Initiating Phase?



- Objectives
- Preliminary planning
- Documentation, Approvals & phase gate

The PM² Artefacts Landscape

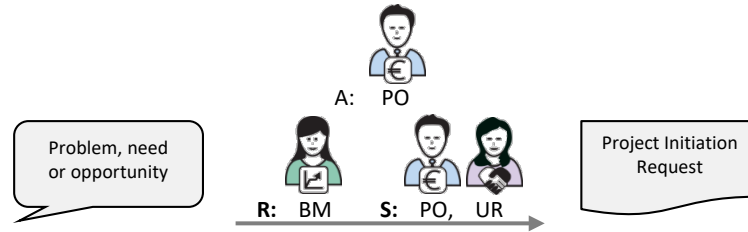


Project Initiation Request



Purpose

- Ensure that the problem/need/opportunity as well as project concept is captured in writing.



RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Initiation Request	I	N/A	A/S	R	S/C	I	N/A	N/A

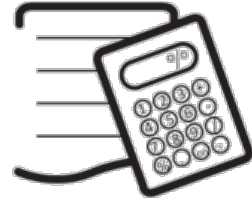
Project Initiation Request



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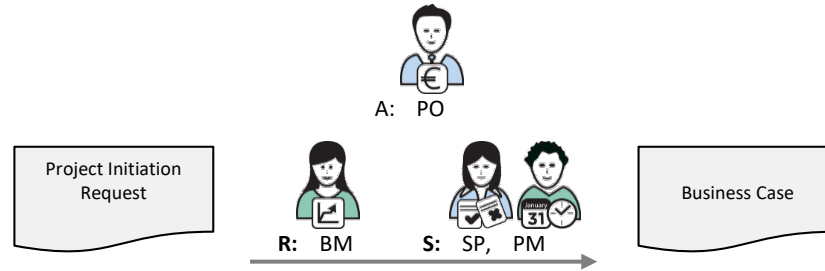
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2.6	Assumptions (high level)	4
2.7	Constraints (high level)	4
2.8	Risks (high level)	4

Business Case



Purpose

- Capture the reasoning for the project.
- Provide the justification for the project and establishes its budgetary constraints.
- Provides information to determine whether the project should move ahead or not.



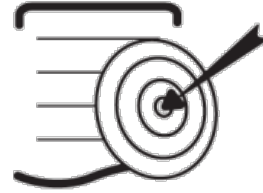
RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Business Case	I	C	A	R	C	S	S	N/A



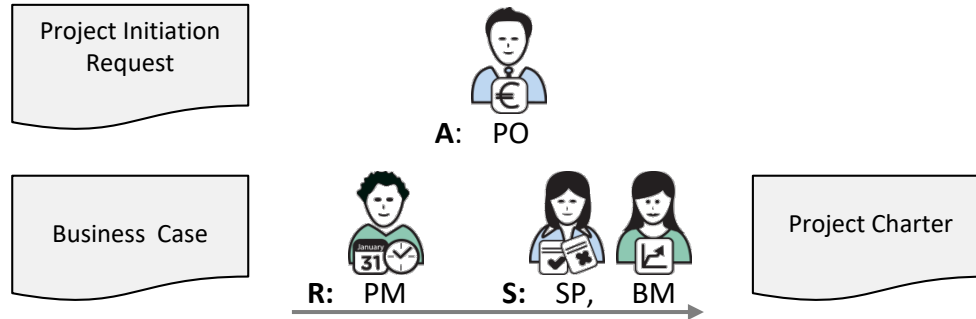
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Project Charter



Purpose

- The charter is a key element of the project approval process (along with the Business Case). It includes the what, how and when fundamentals of the project



RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Charter	I	A	C	S	C	S	R	C

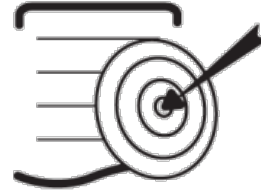
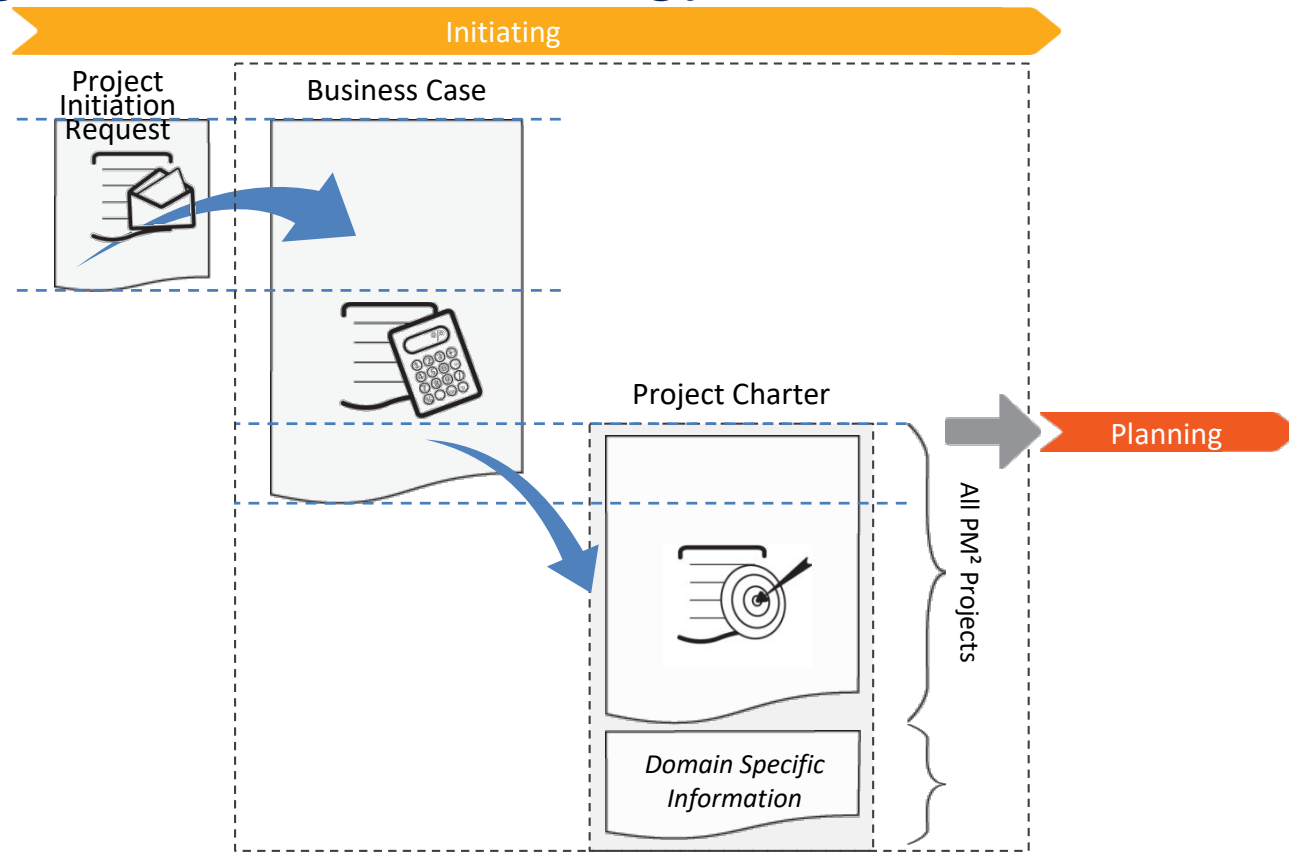


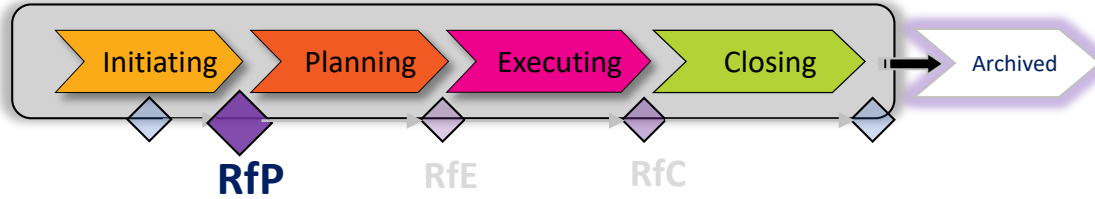
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Initiating Documents Strategy



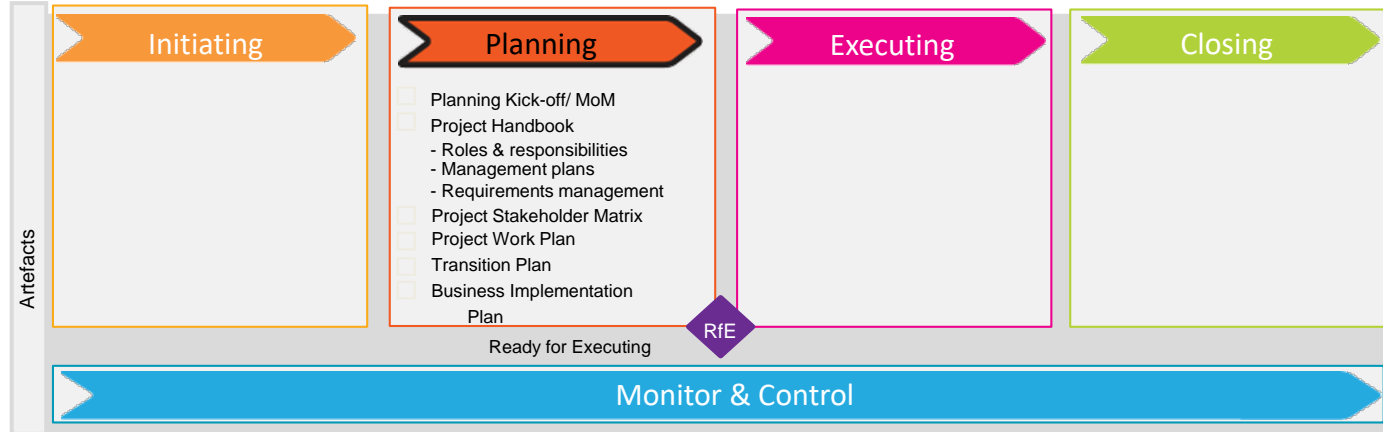
Phase Gate: RfP (Ready for Planning)?



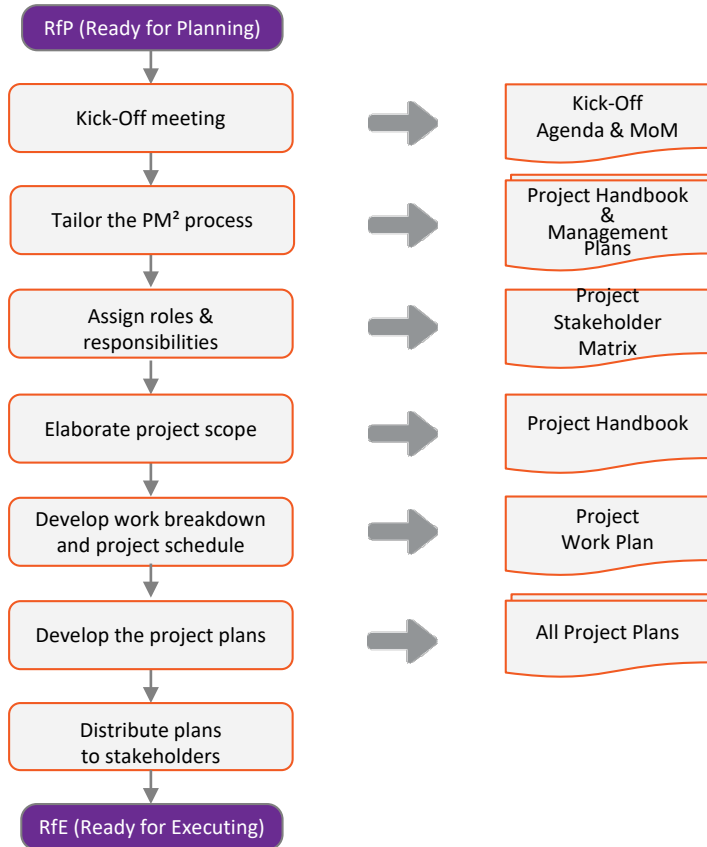
Phase-Exit Review				
DG / Unit:	-<Name of the DG and Unit responsible for the project->			
Project Name:	-<Name of the project->			
Project Owner:	-<Name of the Project Owner->			
Business Manager:	-<Name of the Business Manager->			
Solution Provider:	-<Name of the Solution Provider->			
Project Manager:	-<Name of the Project Manager->			
Reviewer Name:	-<Name of the person performing the quality review->			
Review Date:	-<DD/MM/YYYY->			
Overall Compliance (%)	0.00			
Overall Phase-Exit Review Status:	Red			
Area	Phase-Exit Review Status	Overall % of Compliance	Date	Already performed?
Initiating		0%	11/07/2013	Yes
Planning		0%		Yes
Executing		0%		Yes
Transferring		0%		Yes
Deliverables Acceptance		0%		Yes
Business Implementation		0%		Yes
Closing		0%		Yes

Overall Assessment Key	
Red	Critical / Significant issues or major process non-compliance
Yellow	Issues / Immediate action is taken, or project may require it
Green	No significant non-compliance / compliance at this time

Planning Phase

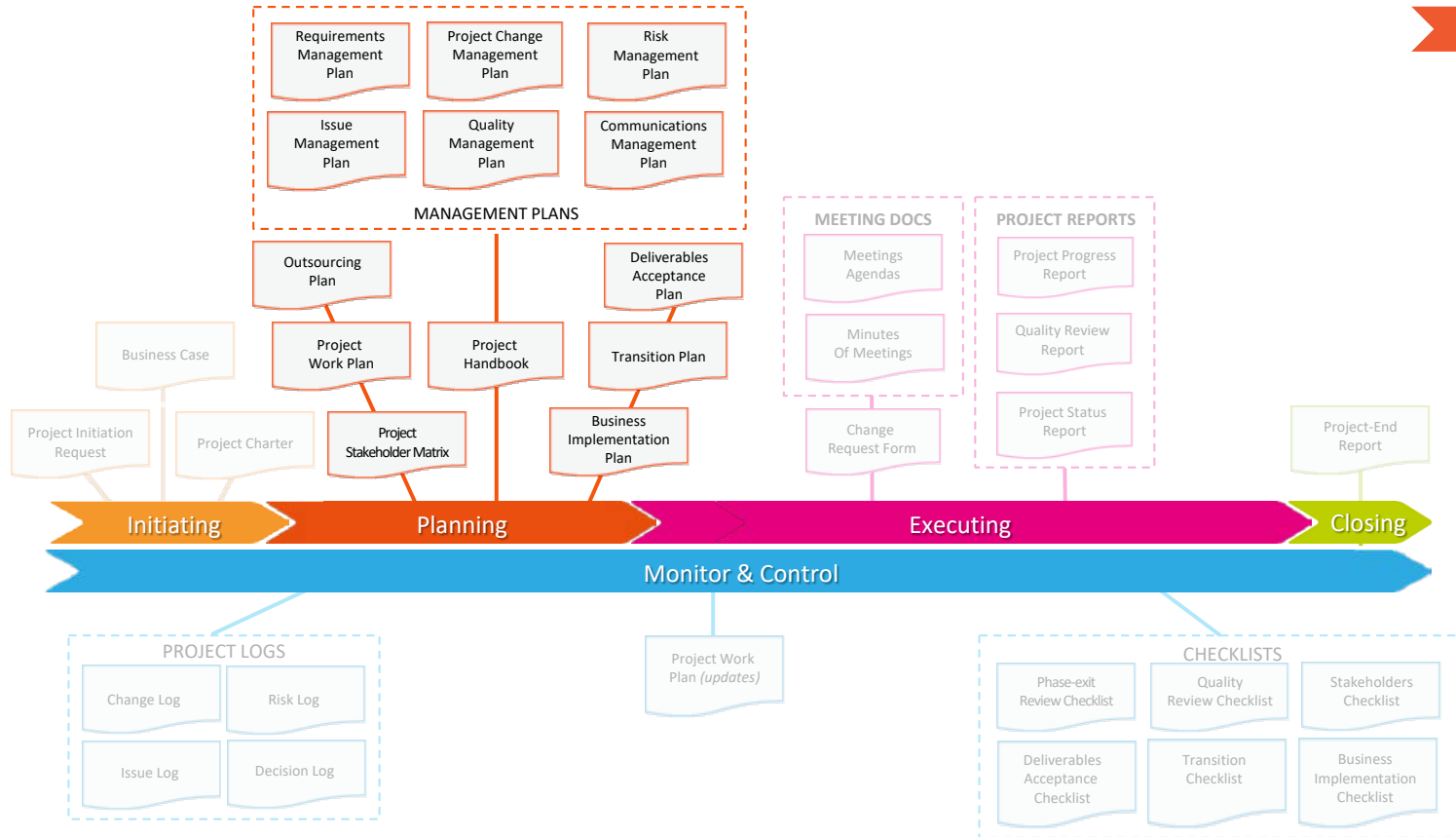


What happens in the Planning Phase?



- Develop the project scope statement
- Determine the appropriate methods for the project.
- Develop the schedule for the various tasks and estimate the necessary resources.
- Develop the various project plans for the project.

The PM² Artefacts Landscape

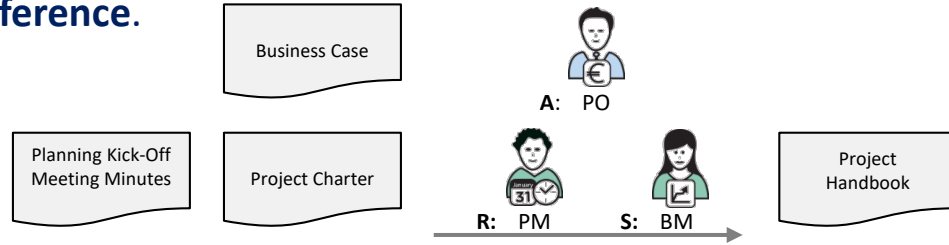




Purpose

- Summarizes the project objectives.
- Documents the overall **management approach**.
- Defines the key controlling processes, the project **policies and rules**.
- The Project Handbook **defines the outputs of the planning**.
- The Project Handbook becomes the basis for managing the project throughout its lifecycle and is an **important point of reference**.

RASCI



RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Handbook	I	I	A	S	C	I	R	C



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4.2. Issue Management.....	
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4.5. Quality Management.....	
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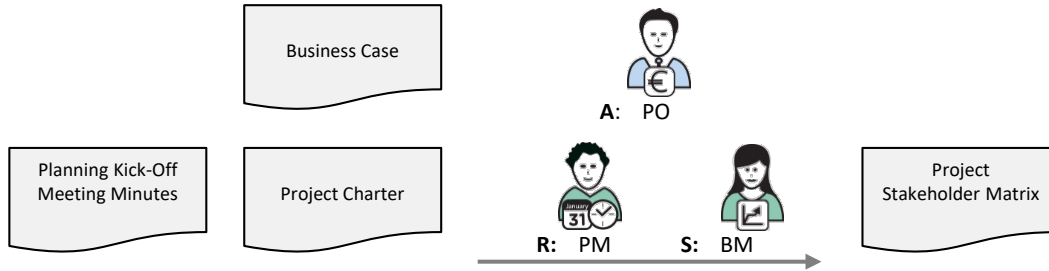
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Project Stakeholder Matrix



Purpose

- List all the people (or groups) involved in (or influential to) the project during the Project Mode (all known people from the requestor or provider side of the project) and their role.



RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Stakeholder Matrix	I	I	A	S	C	I	R	C

Project Stakeholder Matrix



1. PM²-P02: Project Stakeholder Matrix Planning Phase

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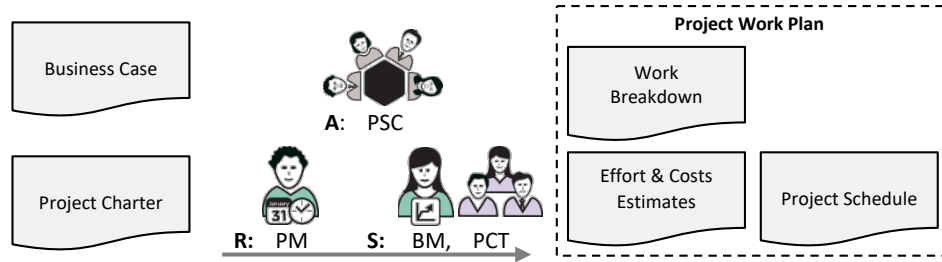
PM ²		PMF Logs V.2.0.1 (May 2013)		Stakeholder Matrix <Project Name>																		
DG	Unit Team	Name	notes	Impact	Teams			Roles			Support			Operational Roles			IT Specific Roles			Comments		
◀	◀	◀	◀	◀	◀	◀	◀	◀	◀	◀	◀	◀	◀	◀	◀	◀	◀	◀	◀	◀	◀	
					Appropriate Governance Body (AGB)			Project Owner (PO)		Project Support Officer (PSO)			User Representative (URS)					Leader of Application Maint				
					Project Steering Committee (PSC)			Business Manager (BM)		Assistant Project Manager (APM)			User					Leader of System Support				
					Project Core Team (PCT)			Solution Provider (SP)		Project Quality Assurance (POA)			Business Analyst					Architecture Officer				
					Project Support Team (PST)			Project Manager (PM)		Contractor Project Manager (CPM)			Support					Functional Architect				
					Business Implementation Group (BIG)								Consultant					Technical Architect				
													Contractors					Analyst Programmer				
																		Release Manager				

Project Work Plan



Purpose

- Identifies and organises the project into activities, sub-tasks, and work packages.
- Establishes a base to estimate the duration of the project.
- Determine the required resources and schedule the work.
- Used as the basis to monitor the progress and control the project.



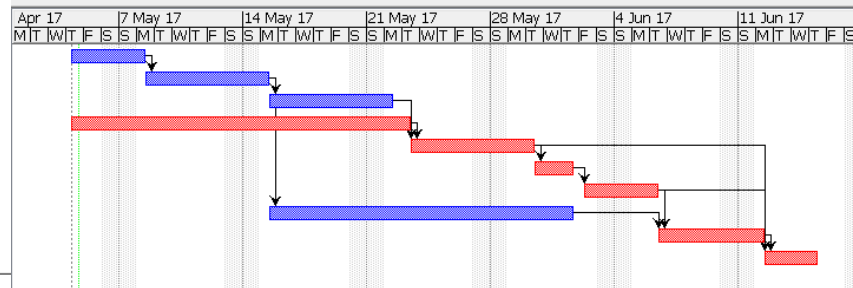
RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Work Plan	I	A	C	S/C	C	C	R	S/C



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Planning: The PM² Management Plans



- Requirements Management Plan
- Project Change Management Plan
- Risk Management Plan
- Quality Management Plan
- Issue Management Plan
- Communications Management Plan

Can be standalone **OR** can be part of the Project Handbook

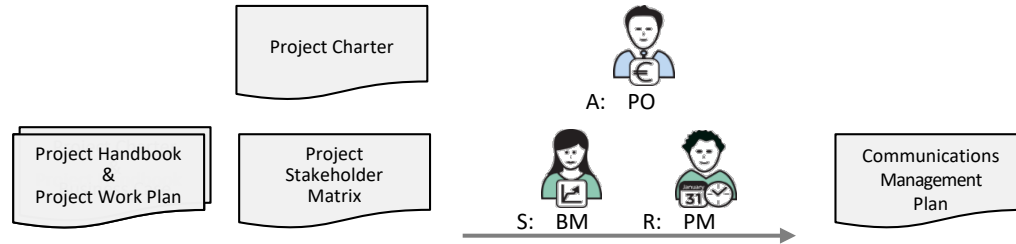
1. PM ² -P06 Risk Management Plan	Planning Phase
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11. SUPPLIER AND SUBCONTRACTOR CONTROLS	4
12. QUALITY RECORDS	4
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Communication Management Plan



Purpose

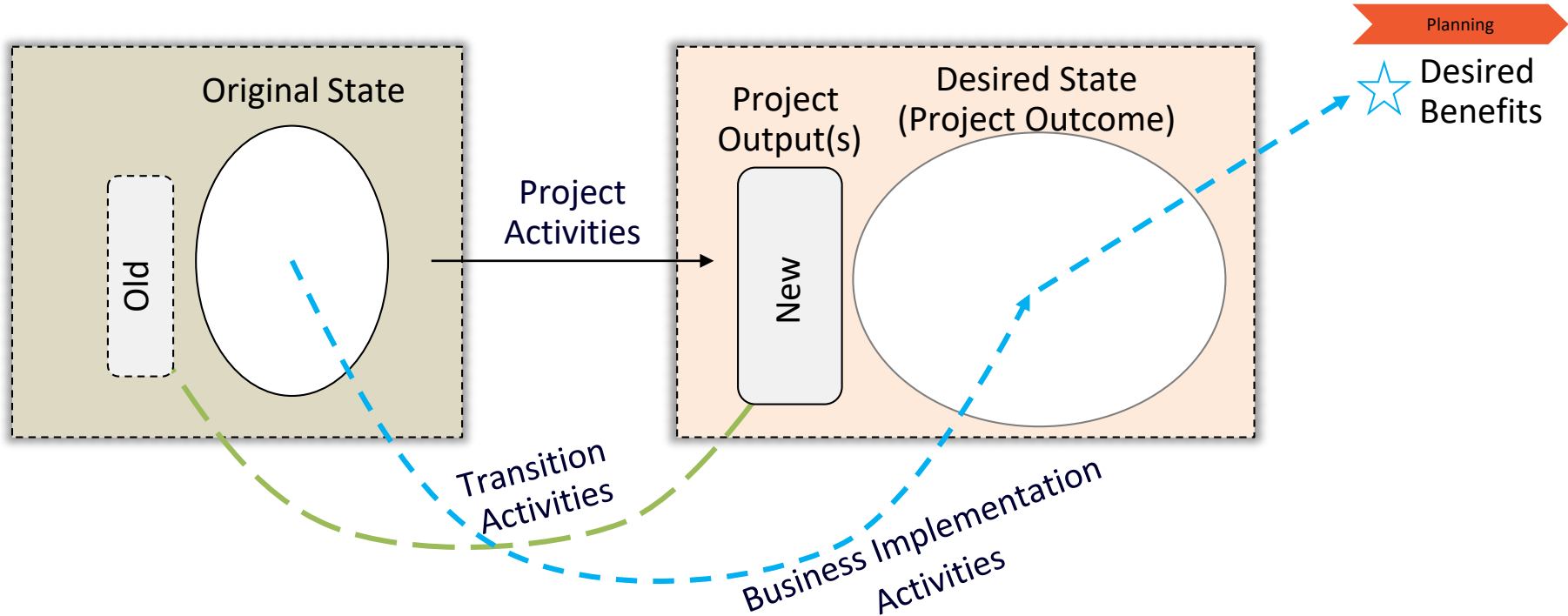
- Ensure that the Project Core Team and all the Project Stakeholders will have the information they need to do their jobs.
- Define the frequency, format, and results of all the communication with both the performing and the participating organisation.



RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Communication Management Plan	I	I	A	S	C	I	R	C

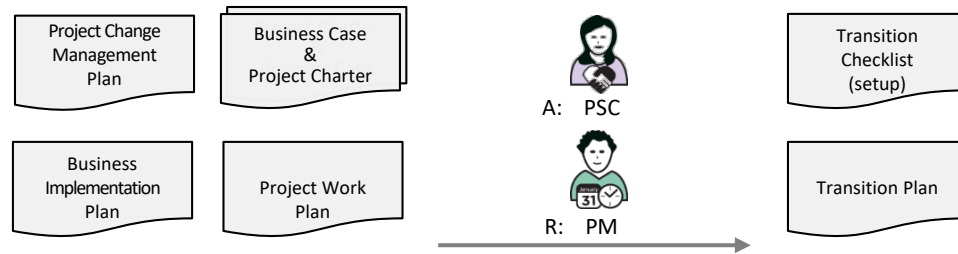
Transition vs Business Implementation



Transition deals with **continuity**,
Business Implementation with **change**

Purpose

- Define the pre-requisites of rolling out the new solution, system, project deliverables. This is useful to ensure the smooth transition from the "project" to the "going live" mode.



RASCI

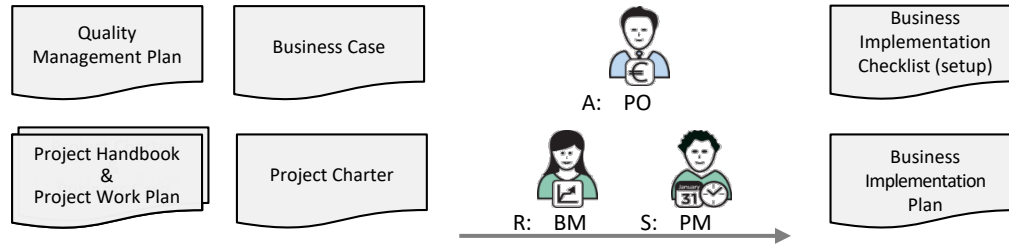
RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Transition Plan	I	A	C	C	C	C	R	C

Business Implementation Plan

Purpose

- Outlines the impact of the project on the organisation
- Define the change management activities that need to take place.
- The organisation must assure project outputs are **effectively integrated** into the organization.
- Integrate **business implementation activities in the Project Work Plan**
- Define post-project change activities.

RASCI

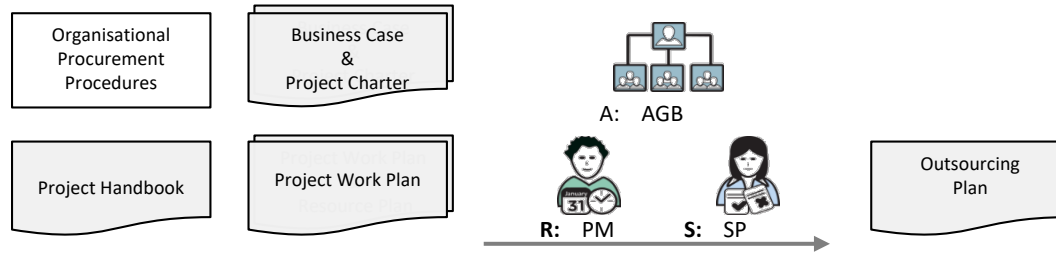


RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Work Plan	I	I	A	R	C	I	S	I

Purpose

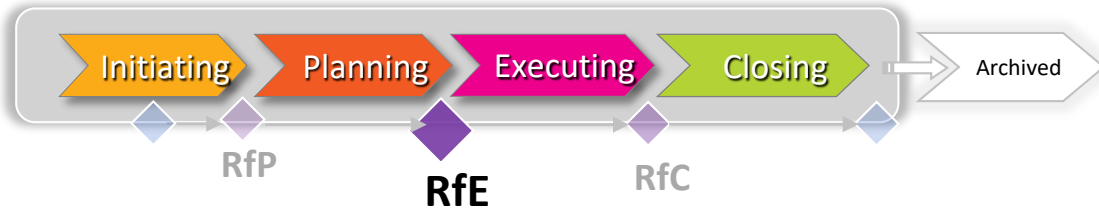
- Ensures that outsourced products and/or services outside the EC fulfils the project needs.
- Identifies the contracting strategies that will be used,
- Outlines the scope of products and/or services to be contracted,
- Identifies responsibilities for the full contract lifecycle.

RASCI



RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Outsourcing Plan	A	C	C	C	I	S	R	I

RfE (Ready for Executing)?



Phase-Exit Review				
DC / Unit:	-Name of the DC and its responsibility for the project- -Name of the project?			
Project Name:	-Name of the Project Owner			
Project Owner:	-Name of the Business Manager			
Solution Provider:	-Name of the Solution Provider			
Project Manager:	-Name of the Project Manager			
Reviewer Name:	-Name of the person performing the quality review			
Review Date:	-Date of review			
Overall Compliance (%)	0.00			
Overall Phase-Exit Review Status:	Red			

Area	Phase-Exit Review Status	Overall % of Compliance	Date	Already performed?
Initiating		0%	11/07/2013	Yes
Planning		0%		No
Executing		0%		No
Transition		0%		No
Deliverables Acceptance		0%		No
Business Implementation		0%		No
Closing		0%		No

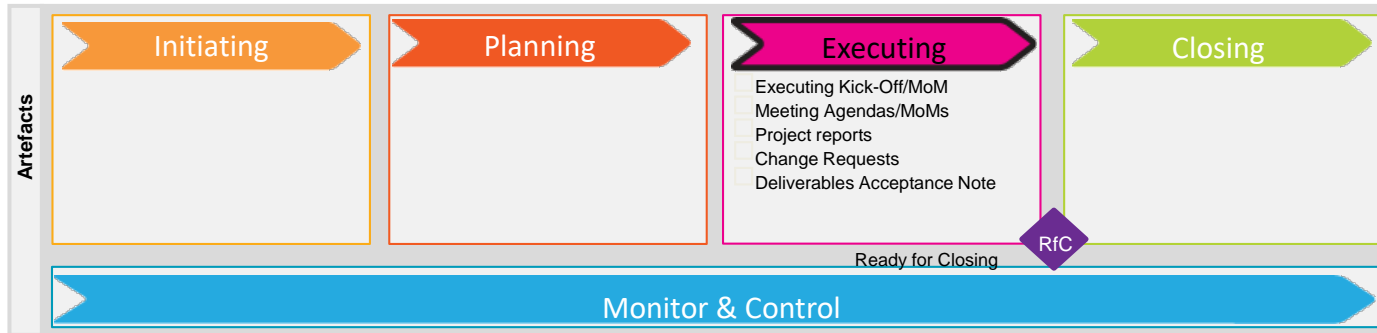
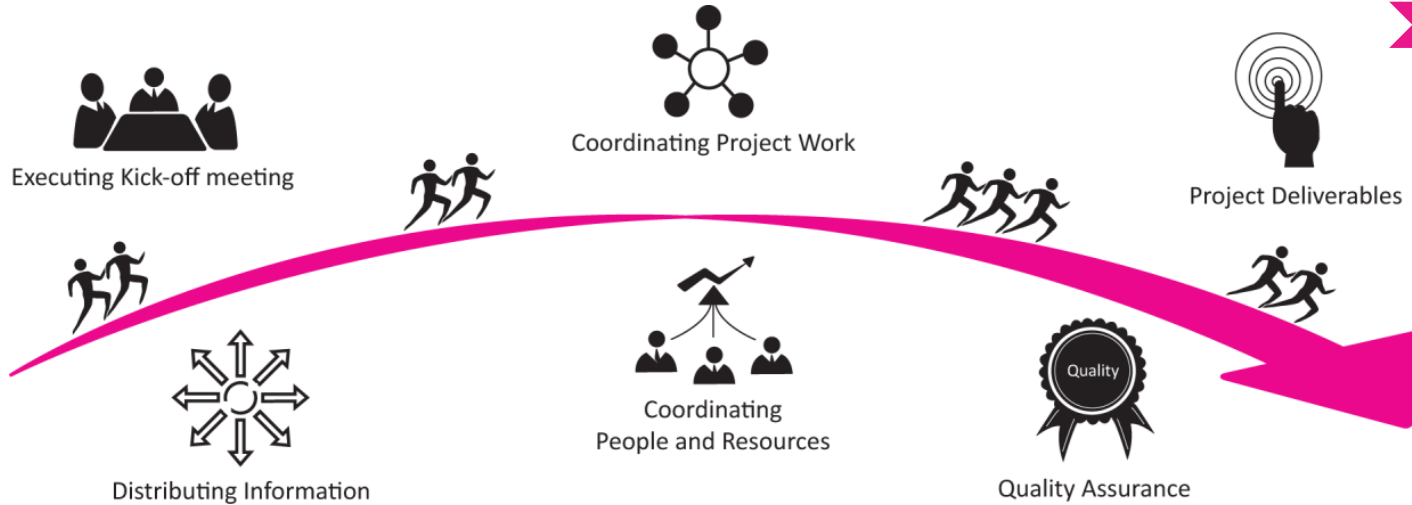
Scoring Guidelines:

- Nothing done, no results, no progress to check on "No" to this question
- Work started in this area, but major improvement required
- Some work done in this area, some results achieved, but needs more improvement
- Meets requirements and expectations, as a prepared program, on "Yes" to this question
- Almost all stage results & projects in place, well managed & executed
- Functional results, "Yes" to critical elements and can be referenced
- NGR: Where the answer to a 1/5 question is "Yes", it or its results should be presented for the reviewer

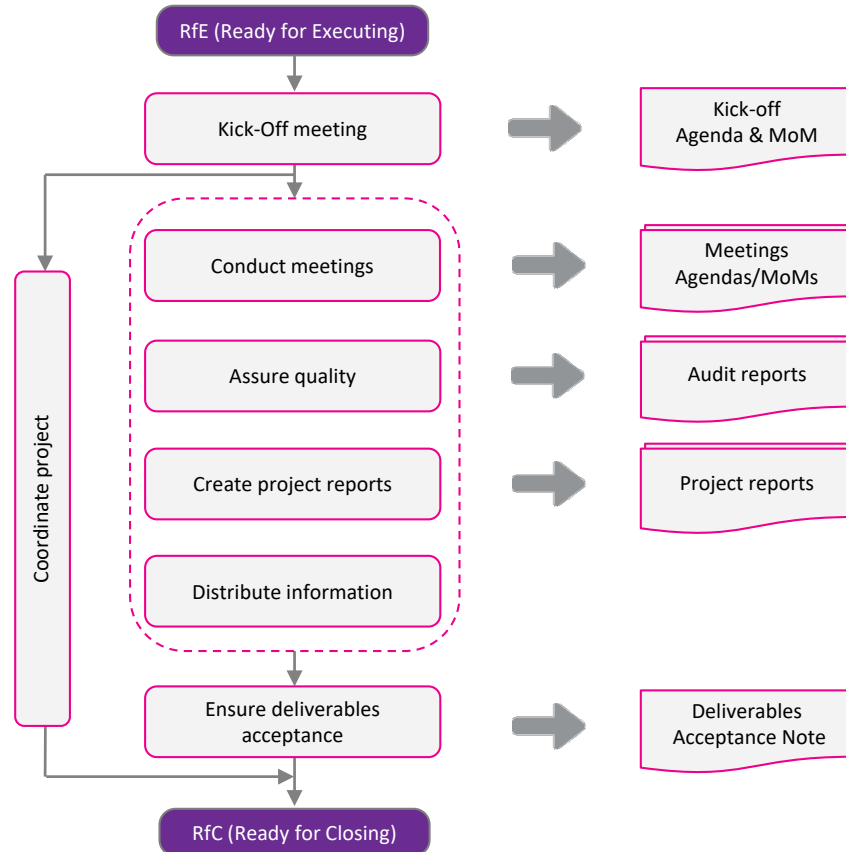
Overall Assessment Key:	Criteria / High-Risk Issues or Major Process Non-Compliance
Red	Critical / High-Risk Issues or Major Process Non-Compliance
Yellow	Without Immediate Action, Risks or Red Flags are not met
Green	No Significant Non-Compliance Issues at this time

Executing Phase

Executing

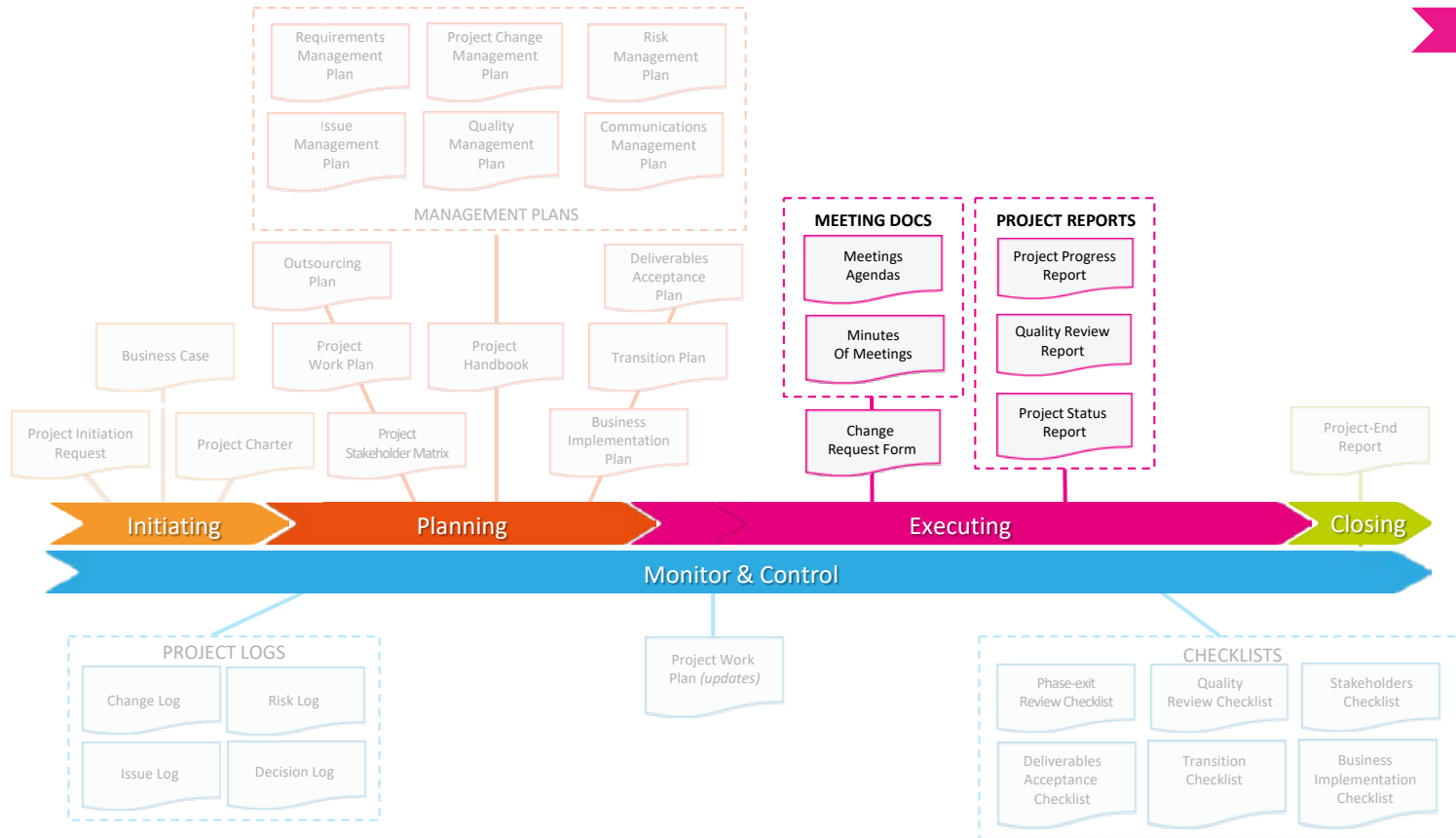


What happens in the Executing Phase



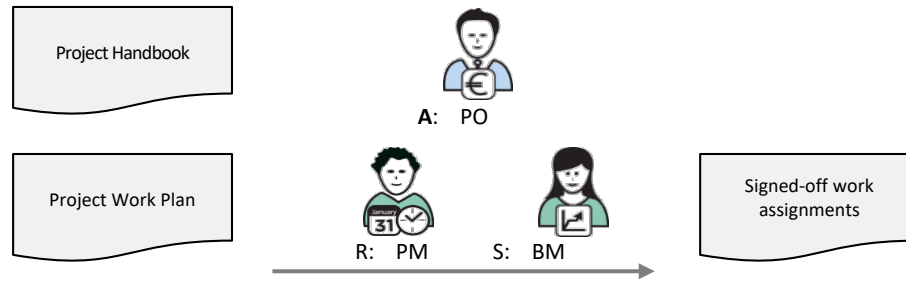
- Coordinating project work
- Coordinating people and resources,
- Execute various project plans.
- Reporting on the project progress Producing the project deliverables.

The PM² Artefacts Landscape



Purpose

- Facilitate the project's progress by continuously providing information to the Project Core Team (PCT) and supporting the completion of assigned work.

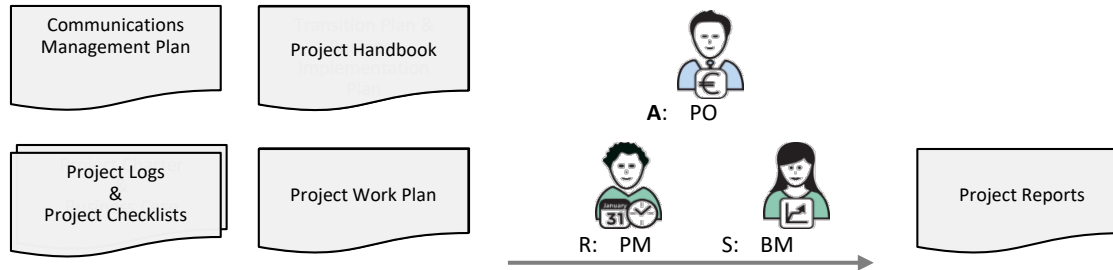


RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Coordination	I	I	A	S	I	I	R	I

Purpose

- document and summarize the status of various dimensions of the project progress for the purpose of communicating it with relevant project Stakeholders.



RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Reporting	I	I	A	S/C	I/C	I/C	R	C

1. Project Progress Report

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1. PROJECT STAKEHOLDERS
2. MILESTONES AND DELIVERABLES
3. PROJECT PLAN PER WORK PACKAGE (ONLY FOR THOSE HAVING A C)
4. RISK LIST
5. ACHIEVEMENTS
6. ONGOING AND PLANNED ACTIONS
7. MAJOR ISSUES & ACTIONS TAKEN
8. ANNEX

Project Status Report

Project: <Name>

PM² Template v3.0

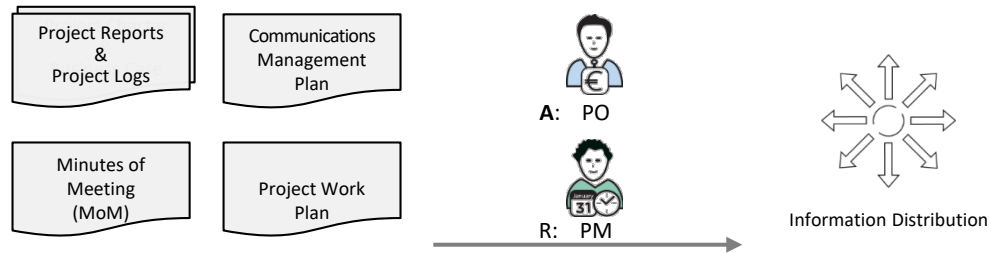
Project phase: <Initiating/Planning/Executing/Closing>

Reporting period: <xx/xx/xx> to <xx/xx/xx>

<p>OVERALL STATUS: Green/Yellow/Red</p> <p>Project Owner (PO): <Name> Business Manager (BM): <Name> Solution Provider (SP): <Name> Project Manager (PM): <Name></p> <p>PROJECT INDICATORS</p> <p>Schedule: Green/Yellow/Red</p> <ul style="list-style-type: none"> > Baselined delivery date: <xx/xx/xx> > Forecasted delivery date: <xx/xx/xx> > Variance: <+ xx months> <p>Cost: Green/Yellow/Red</p> <ul style="list-style-type: none"> > Baselined: <xx> workdays, <xx,xxx,xx> € > Spent: <xx> workdays, <xx,xxx,xx> € > Forecasted: <xx> workdays, <xx,xxx,xx> € > Variance: <0% (Forecasted - Baselined)> <p>PROJECT INDICATORS (AT CURRENT STATE)</p> <p>Status: Green/Yellow/Red</p> <p>Planned: <xx> workdays Actual work: <xx> workdays Earned Value (Progress): <xx> workdays Remaining work: <xx> workdays</p> <div style="text-align: center;"> </div> <p>Green curve: Planned effort (workdays) over weeks Red curve: Current cost consumption (workdays) Blue curve: Earned value (workdays)</p>	<p>PROJECT PROGRESS</p> <div style="text-align: center;"> </div> <p>MILESTONES</p> <ul style="list-style-type: none"> <xx/xx/xx>, <describe project milestone 1> <xx/xx/xx>, <describe project milestone 2> <xx/xx/xx>, <describe project milestone 3> <xx/xx/xx>, <describe project milestone 4> <xx/xx/xx>, <describe project milestone 5> <xx/xx/xx>, <describe project milestone 6> <p>PROJECT CHANGES (INPUT FROM CHANGE LOG)</p> <p>Status: Green/Yellow/Red</p> <ul style="list-style-type: none"> > Severe: <xx> > <id xx>, category <xx>, status <xx> > <id xx>, category <xx>, status <xx> > <id xx>, category <xx>, status <xx> <p>RISKS (INPUT FROM RISK LOG)</p> <p>Status: Green/Yellow/Red</p> <ul style="list-style-type: none"> > Active: <xx> > <id xx>, level <xx>, action <xx> > <id xx>, level <xx>, action <xx> > <id xx>, level <xx>, action <xx> <p>ISSUES (INPUT FROM ISSUE LOG)</p> <p>Status: Green/Yellow/Red</p> <ul style="list-style-type: none"> > Urgent: <xx> > <id xx>, size <xx>, severity <xx> > <id xx>, size <xx>, severity <xx> > <id xx>, size <xx>, severity <xx>
<p>ACTIVITIES PERFORMED AND PLANNED</p>	

Purpose

- Information distribution is based on the Communications Management Plan and aims to regularly communicate key information to Project Stakeholders.

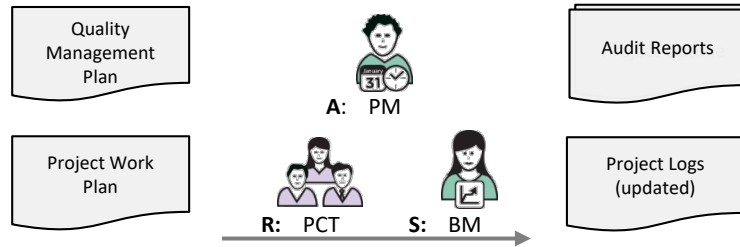


RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Project Reporting	I	I	A	C	I	I	R	C

Purpose

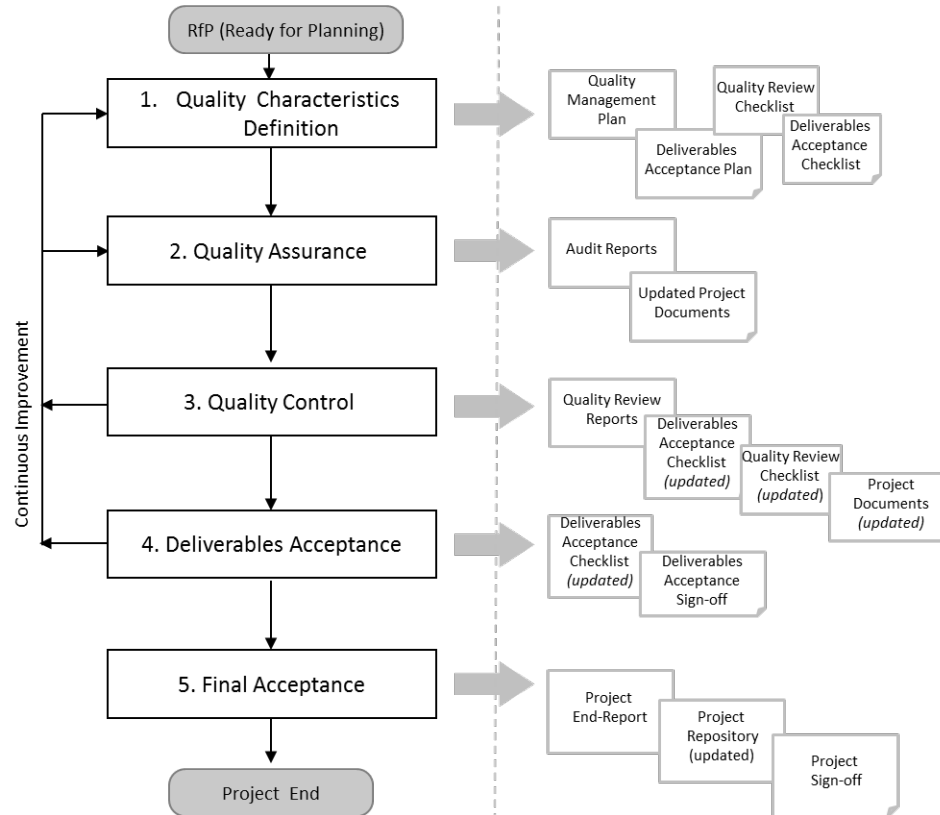
- Quality Assurance activities as described in the Quality Management Plan are executed. Quality Assurance (QA) in projects refers to the systematic activities implemented to ensure that quality requirements are fulfilled. All QA activities are planned in order to provide enough confidence that the product will satisfy the given requirements for quality.



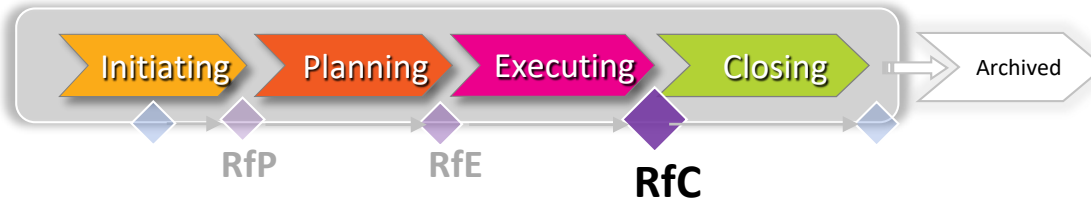
RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Quality Assurance	I	I	I	S	C	I	A	R

The PM² Quality Management Process



RfC (Ready for Closing)?



Phase-Exit Review				
DC / Unit:	-Name of the DC and its response for the project ->			
Project Name:	-Name of the project ->			
Project Owner:	-Name of the Project Owner ->			
Business Manager:	-Name of the Business Manager ->			
Solution Provider:	-Name of the Solution Provider ->			
Project Manager:	-Name of the Project Manager ->			
Reviewer Name:	-Name of the person performing the quality review ->			
Review Date:	-Date of review ->			
Overall Compliance (%)	0.00			
Overall Phase-Exit Review Status:	Red			

Area	Phase-Exit Review Status	Overall % of Compliance	Date	Already performed?
Initiating		0%	11/07/2013	Yes
Planning		0%		No
Executing		0%		No
Transition		0%		No
Deliverables Acceptance		0%		No
Business Implementation		0%		No
Closing		0%		No

Scoring Guidelines:

- Nothing done, no results, no progress to check on "No" in "Yes/No question"
- Work started in this area, but major improvement required
- Some work done in this area, some results achieved, but needs more improvement
- Meets requirements and expectations, as a project progresses, on "Yes" for "Yes question"
- Almost all stage results & projects in place, well managed & executed
- Functional results, "Yes" in "Yes" - otherwise not yet performed

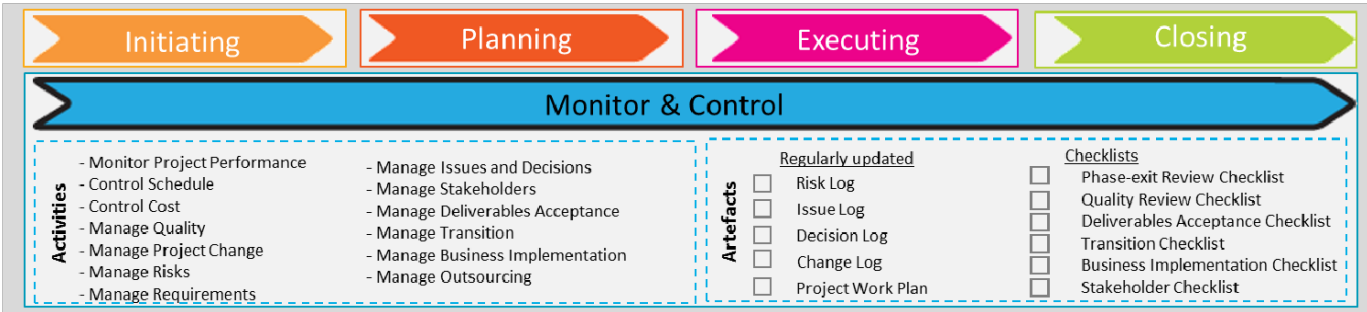
NOTE: Where the answer to a "Yes" question is "Yes", it or its results should be presented for the review.

Overall Assessment Key:	0.00%	0.00%	0.00%
Red	Critical / High-Risk issues or major process non-compliance	Without immediate action, status or risk may become red	
Yellow	Minor	No significant non-compliance issues at this time	
Green	Good		

Phase-Exit Review

Project Quality Profile

Monitor & Control



What happens During Monitor & Control

During Monitor & Control all work is observed from the point of view of the Project Manager. The key activities in Monitor & Control are listed below:

- Tracking and controlling of project variables (time, cost, resource use, risk...).
- Managing of issues, risk and changes.
- Quality controlling performed as described in the quality plan.
- Controlling of project deliverables so that they meet the predefined objectives.
- Ensuring that the transitions of the project to production will be done in a smooth way.



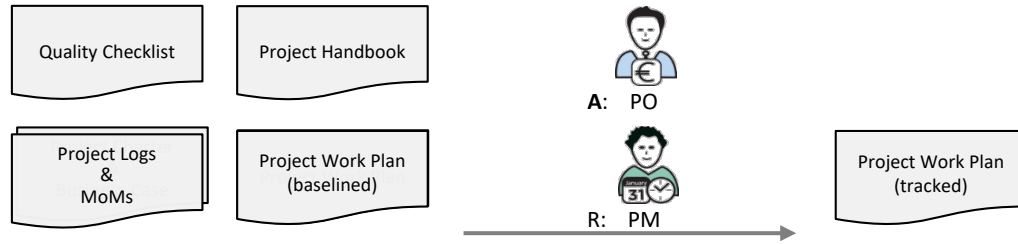
Monitor & Control Activities

- Monitor Project Performance
- Control Schedule
- Control Cost
- Manage Requirements
- Manage Quality
- Manage Project Change
- Manage Risks
- Manage Issues and Decisions
- Manage Deliverables Acceptance
- Manage Stakeholders
- Manage Transition
- Manage Business Implementation

Purpose

- Monitor the project performance in order to be in a position to know whether the project is advancing satisfactorily.
- Tracks project variables (i.e. cost, schedule, scope and quality), monitor's risks, project change and overall project performance, as to be in a position to report and forecast project evolution to the project Stakeholders.

RASCI

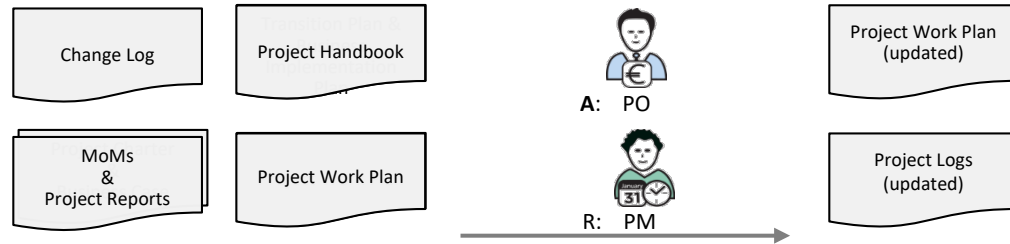


RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Monitor Project Performance	I	I	A	C	C	I	R	C

Purpose

- Ensure that tasks are executed as scheduled and the deadline for the project can be achieved.
- Inform stakeholders about (foreseen) delays.
- Obtain task status information from the Project Core Team (PCT)
- Update Project Work Plan.

RASCI

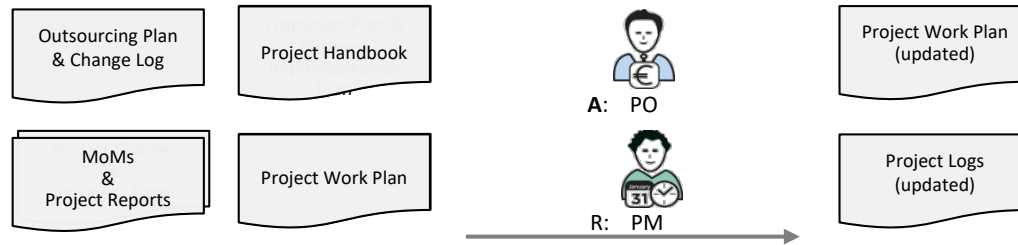


RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Control Schedule	I	I	A	C	C	I	R	C

Purpose

- Ensure that actual project cost remain aligned with project budget.
- Monitor the budget and track the difference between budgeted, actual and forecast costs.
- Report important variances through the status report
- Obtain approval from the Project Owner (PO) for deviations

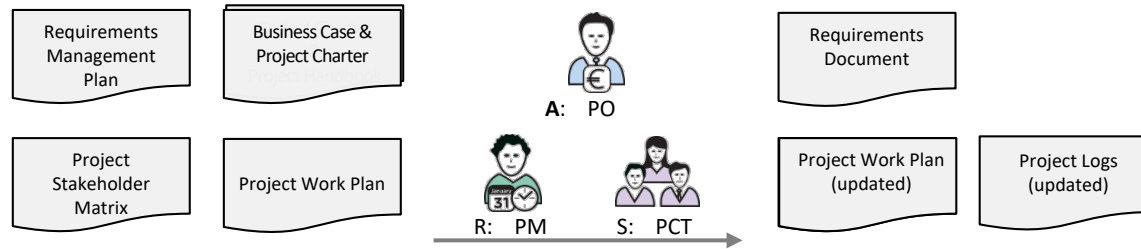
RASCI



RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Control Cost	I	I	A	C	C	I	R	C

Purpose

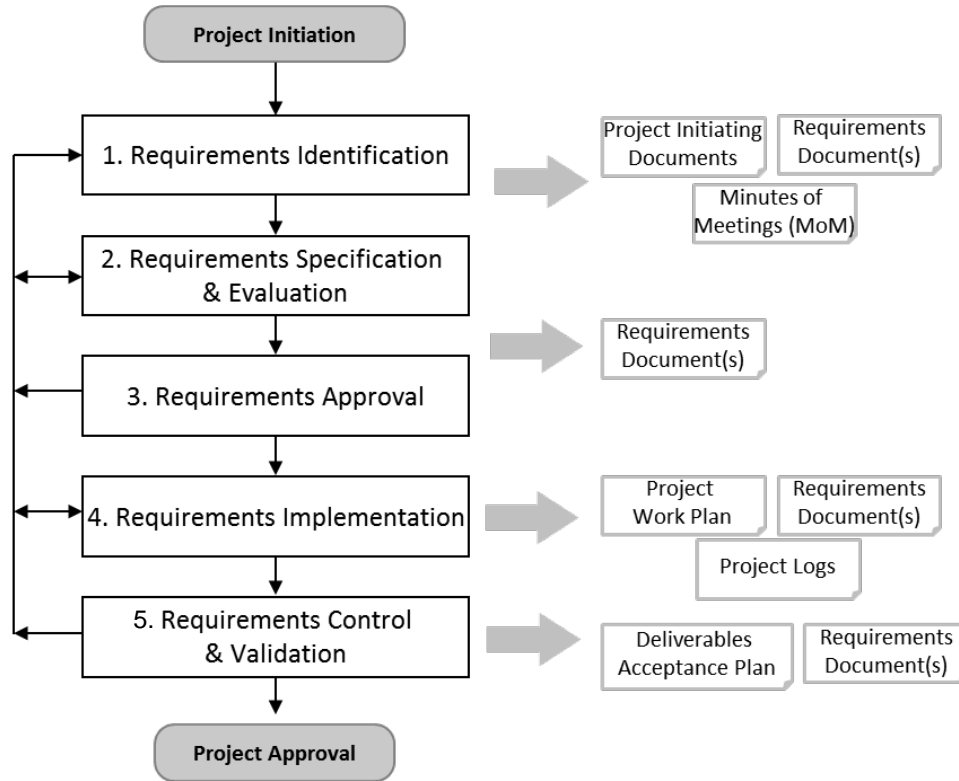
- Gather, document, validate requirements and control their implementation and change.



RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Requirements	I	I	A	C	C	I	R	S

Manage Requirements



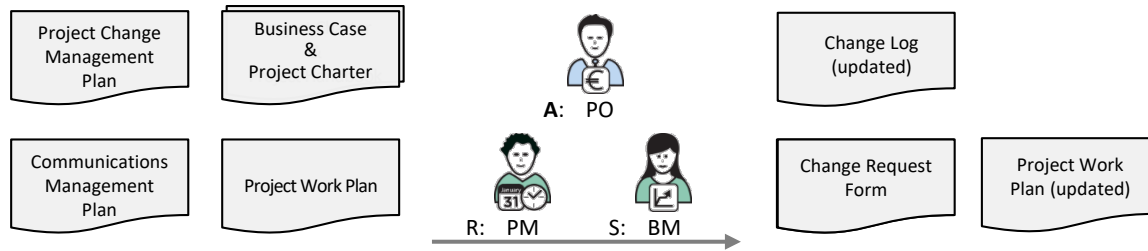
Manage Project Changes

Purpose

- Identify, document, assess, approve, prioritise, planning and controlling project changes, and communicating them to all relevant stakeholders.

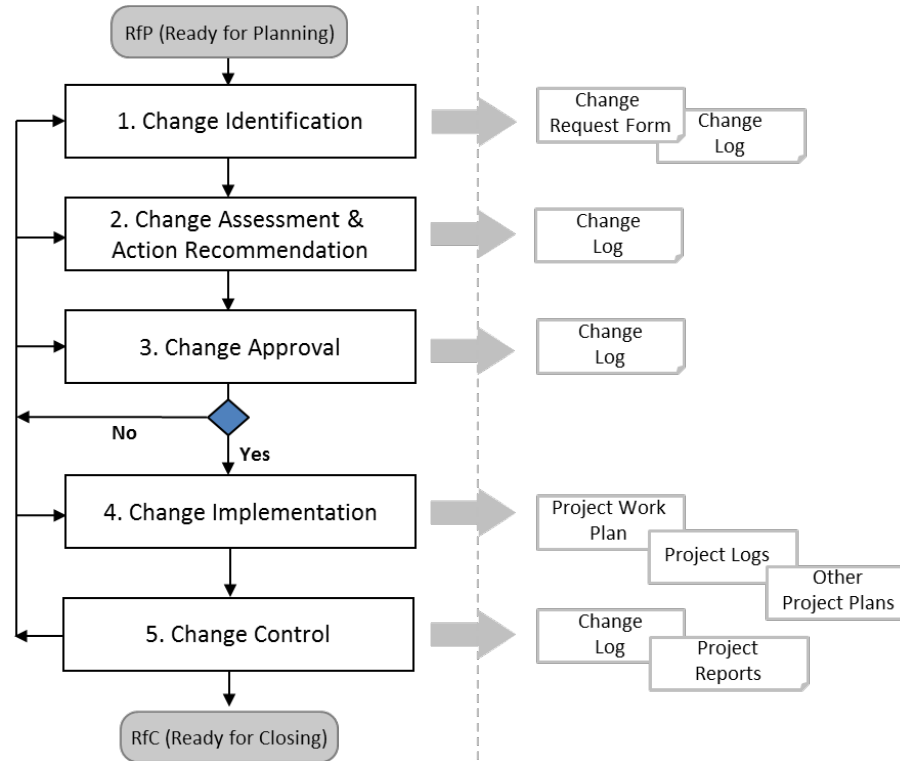
Changes can be requested (or identified and raised) throughout the project lifecycle by any project stakeholder and can be related to a change in the project scope, requirements, deliverables and features, or quality characteristics of the project.

RASCI



RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Project Changes	I	C	A	S	I	I	R	C

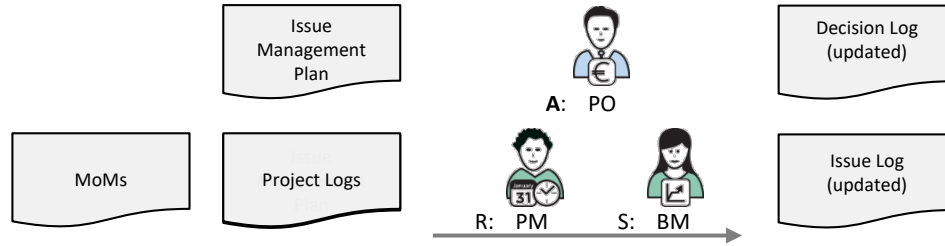
Manage Project Changes



Purpose

- Identify, evaluate and manage issues for resolution by Project Stakeholders.

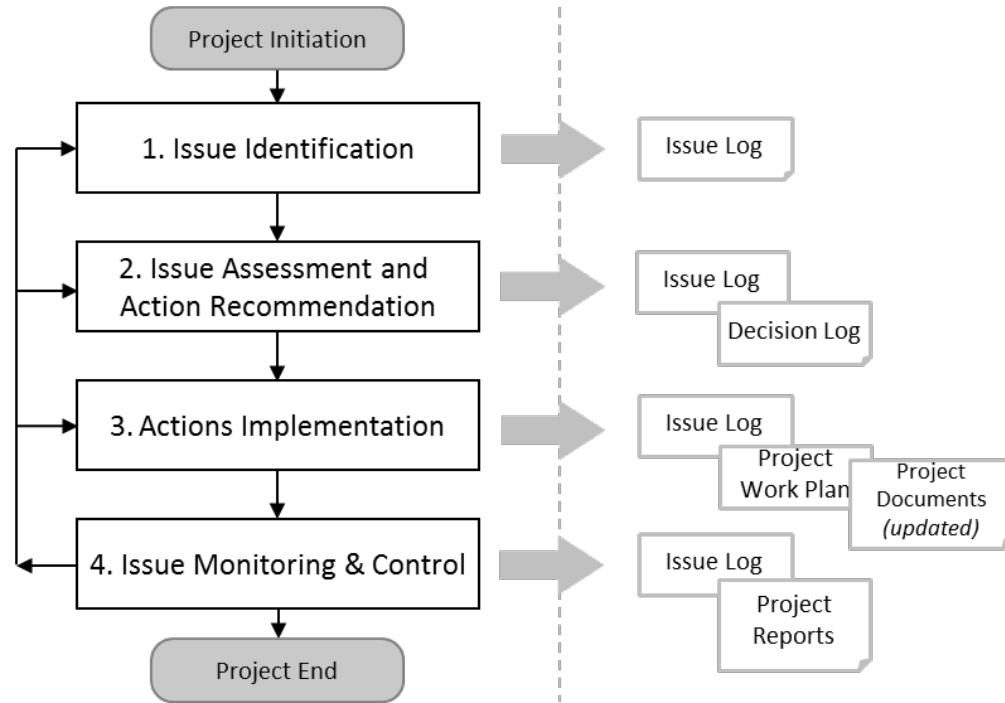
An **issue** is an immediate problem requiring resolution. Anyone can raise issues and issues can be raised in team meetings or via communication towards the Project Manager (PM). Issues must be resolved as soon as possible. It is always important to solve the root cause, not the symptom. This will ensure that the problem will not re-occur.



RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Issues & Decisions	I	I	A	S	C	I	R	C

Manage Issue & Decisions

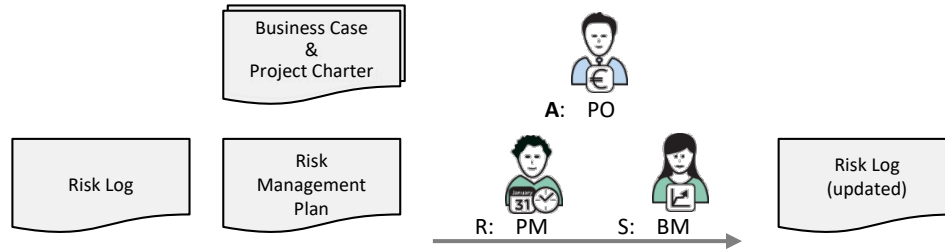


Purpose

- identify, assess and manage risks so that they conform to the organisation’s accepted risk attitude.
- improve the project team’s confidence by proactively managing any potential event that might have a positive or negative impact on project objectives.

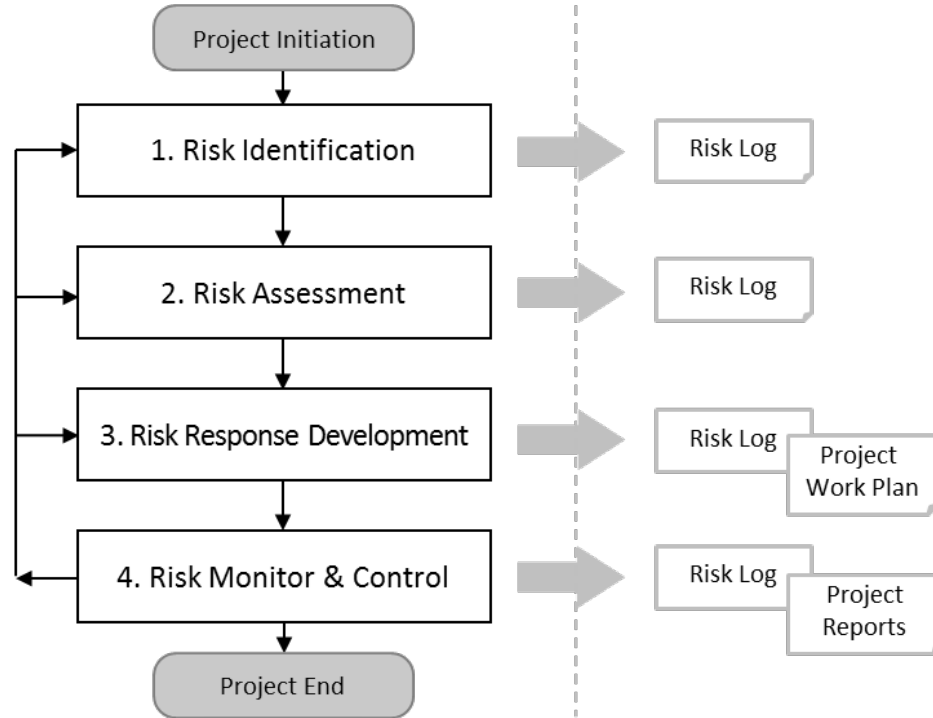
A **risk** is an uncertain event or set of events (positive or negative) that, should it occur, will have an effect on the achievement of project objectives.

RASCI



RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Risk	I	C	A	S/C	C	I	R	C

Manage Risk

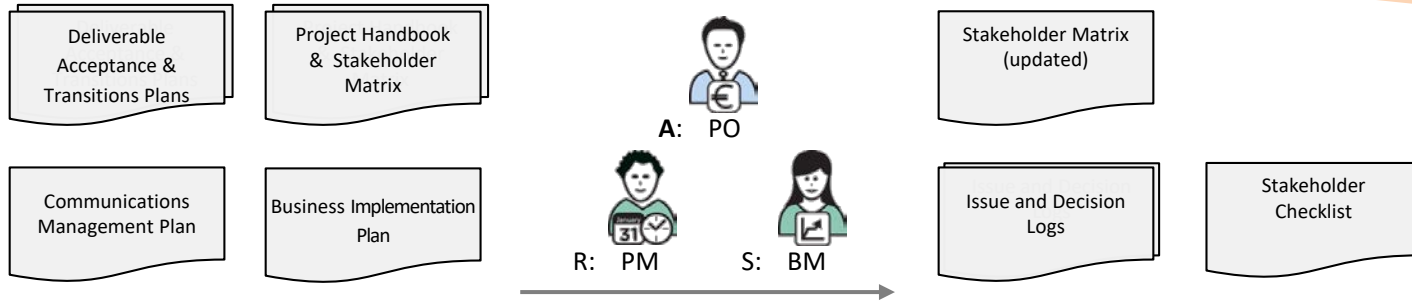


Purpose

- Identifying project stakeholders
- Capture stakeholder's project expectations and requirements
- Communicating with projects stakeholders throughout project lifecycle
- Capturing stakeholders' overall project experience and satisfaction

Project stakeholders are people (or groups) who can affect or be affected by both the activities performed during the life of a project, or/and by the project's output(s) and outcome(s).

RASCI

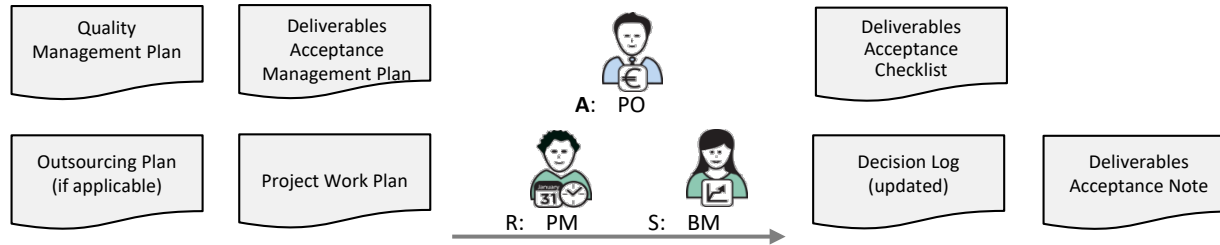


RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Stakeholders	I	I	A	S/C	I	C	R	I

Manage Deliverable Acceptance

Purpose

- To ensure formal accept of project deliverables based on predefined objectives and set of criteria as defined in the Deliverables Acceptance Plan

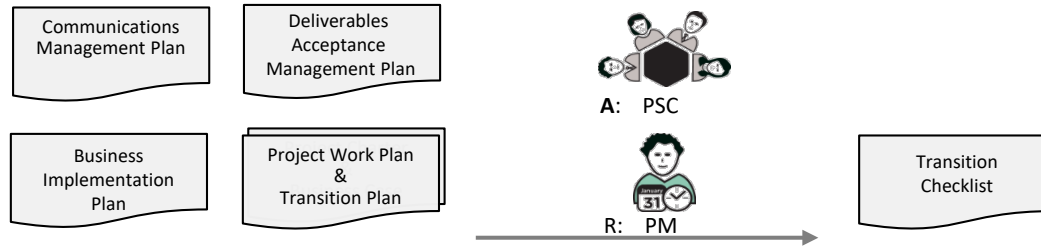


RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Deliverable Acceptance	I	I	A	S	C	C	R	C

Purpose

- To ensure a controlled and smooth transition from the old state to the new state in which the new product/service developed by the project is put in place.
- Management of any relevant communication activities
- Ensure close cooperation between the Project Manager (PM) and the Business Manager (BM)

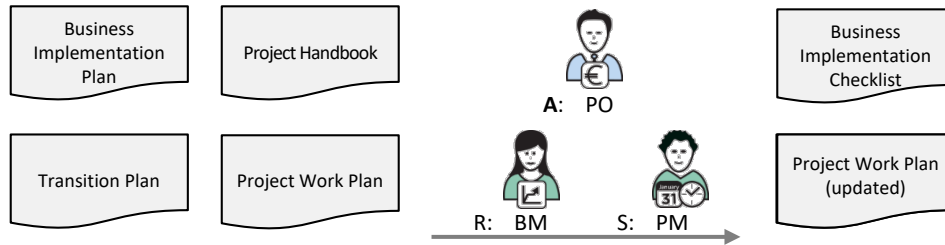


RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Transition	I	A	C	C	C	C	R	C

Purpose

- The effective execution of all business implementation activities, critical for smooth operations, even after the project's outputs have been delivered to the stakeholder/user community.
- It's a good practice to also define some post-project change activities, however, their implementation falls outside the domain of responsibilities of the project



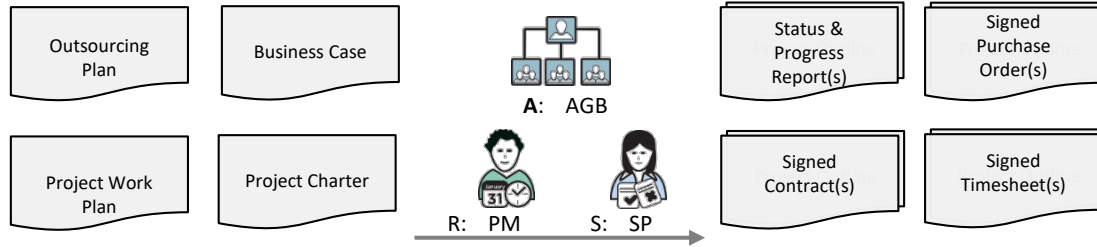
RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Business Implementation	I	I	A	R	C	I	S	I

Purpose

- To ensure with the Contractor's Project Manager (CPM) that the Contractor delivers acceptable quality of work as defined in the Outsourcing Plan.

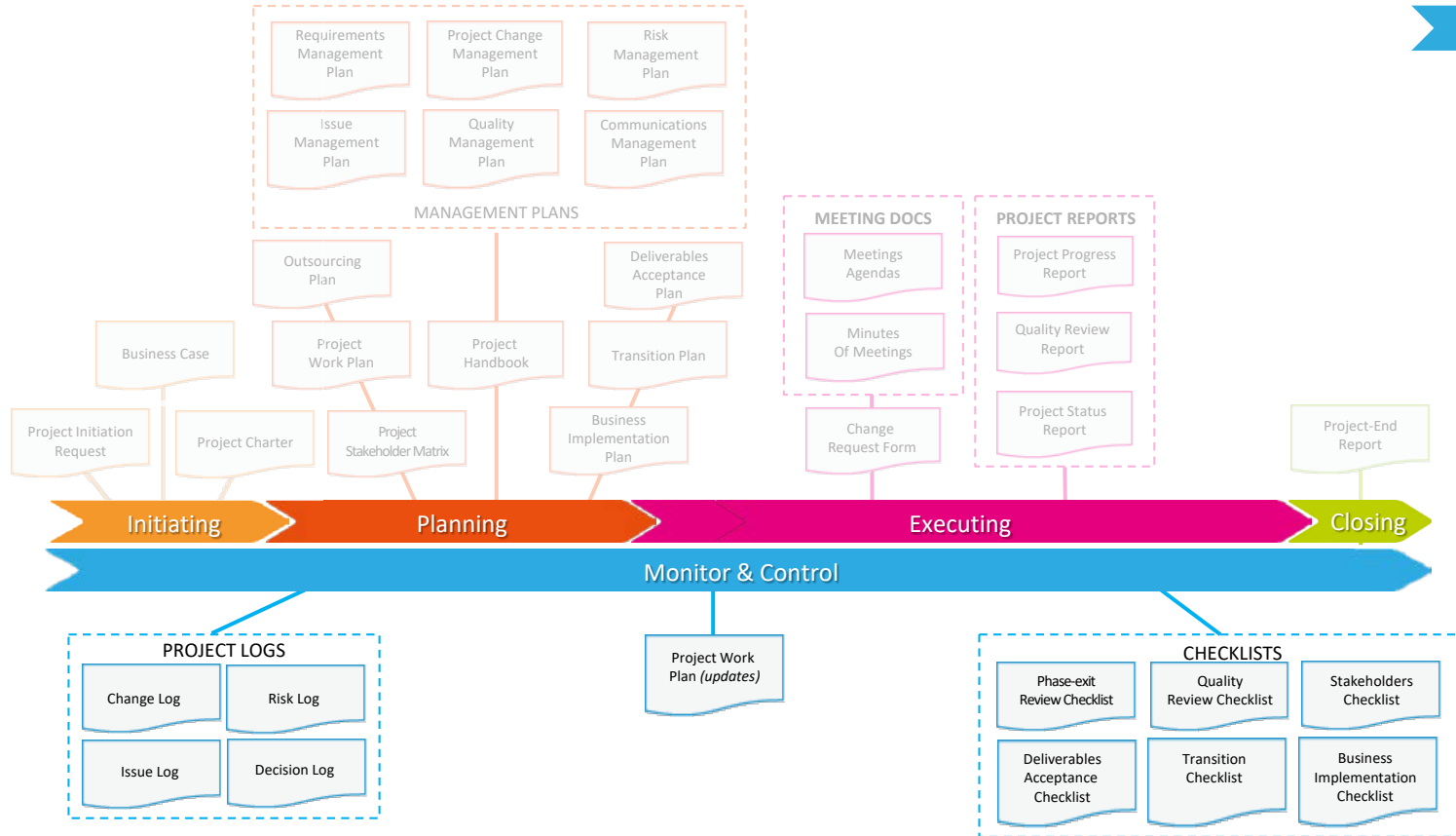
Note that the EC procurement process supersedes this guideline.



RASCI

RAM (RASCI)	AGB	PSC	PO	BM	BIG	SP	PM	PCT
Manage Outsourcing	A	C	C	C	I	S	R	I

Monitor & Control Tools



PM² PM² Logs v3.0

Issue Log
<Project Name>

Issue Identification and Description							Issue Assessment and Action Description							
ID	Category	Issue Name	Issue Description & Details	Status	Identified By	Identification Date	Action Details (effort & responsible)	Urgency	Impact	Size	Target Date	Issue Owner	Escalation	Traceability/Comments
IL1	<External>	<Non-compliance with the contract>	<Detail text 1>	<Open>	<Name X>	<xx/xx/xx>	<For the remediation plan, the effort is 100h, responsible is the PMO>	<4>	<S>	<4>	<xx/xx/xx>	<Name Z>	<Yes>	<Related artefacts: W-1, W-2, W-3, W-4>

PM² PM² Logs v3.0

Decision Log
<Project Name>

Identification							Ownership			Implementation		
ID	Category	Title	Description	Initiated by	Persons present during decision	Comments	Decision Owner	Decision Date	Escalation	Application Date	Decision communicated to:	
D01	<Business>	<Change in contract>	<Detail text 1>	<Name X>	<Project Steering>	<Related artefacts: W-1, W-2, W-3, W-4>	<Project>	<dd/mm/yyyy>	<Yes>	<dd/mm/yyyy>	<Project Core Team, Project Steering Committee>	

PM² PM² Logs v5.0

Change Log
<Project Name>

Identification							Assessment				Decision				Implementation	
ID	Category	Title	Description	Status	Requested by	Date Identified	Action Details (effort & responsible)	Size	Priority	Target Delivery Date	Escalation	Decision	Decided by	Decision Date	Actual Delivery Date	Comments
CD1	<New service>	<New service to be implemented>	<Detail text 1>	<Identified>	<Name X>	<dd/mm/yyyy>	<For the new service, the effort is 100h, responsible is the PMO>	<XS>	<High>	<dd/mm/yyyy>	<Yes>	<Approved>	<Name Z>	<dd/mm/yyyy>	<dd/mm/yyyy>	<Related artefacts: W-1, W-2, W-3, W-4>

PM² PM² Logs v3.0

Risk Log
<Project Name>

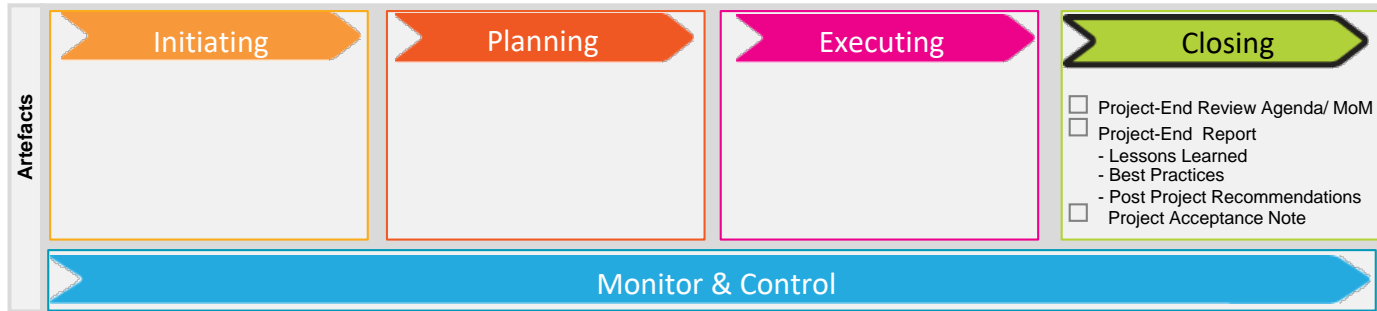
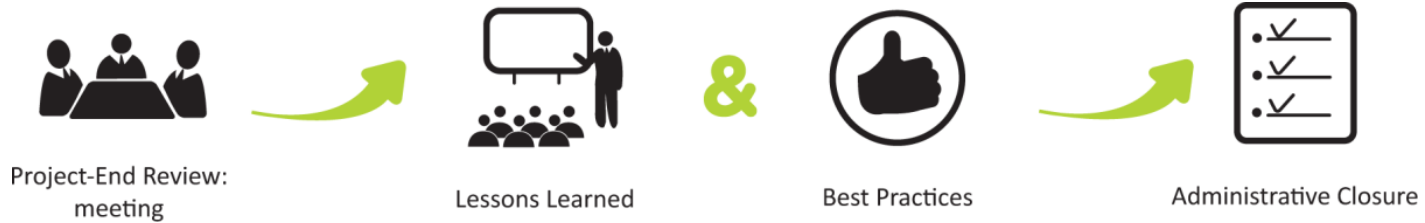
Risk Identification and Description							Risk Assessment					Risk Response			
ID	Category	Risk Name	Risk Description & Details	Status	Identified By	Identification Date	Likelihood	Impact	Risk Level (L#)	Risk Owner	Escalation	Risk Response Strategy	Action Details (effort & responsible)	Target Date	Traceability/Comments
RL01	<Business>	<Internal Fraud>	<Because of (CONDITION), it might be that (EVENT), which will lead to(IMPACT).>	<Proposed>	<Name X>	<xx/xx/xx>				<Name M>	<Yes>				
RL02	<IT>	<Unauthorized access to data>	<As a result of (CAUSE), (EVENT) may occur, which would lead to (EFFECT).>	<Investigating>	<Name Y>	<xx/xx/xx>				<Name H>	<Yes>				
RL03	<External>	<Poor contractor performance>	<Because of (CONDITION), it might be that (EVENT), which will lead to(IMPACT).>	<Approved>	<Name Z>	<16/04/13>	<3>	<4>	<12>	<Name K>	<Yes>	<Reduce>	<The contract with the Outsourcer will include detailed SLAs and associated financial penalties.>	<05/06/2013>	<Related artefacts: Decision Log ID: DL03.>
RL04	<IT>	<Unavailability of data, systems or services>	<As a result of (CAUSE), (EVENT) may occur, which would lead to (EFFECT).>	<Approved>	<Name A>	<16/04/13>	<2>	<4>	<8>	<Name L>	<Yes>	<Reduce>	<Define and agree on with the hosting environment Responsible the necessary activities, document them in a plan and monitor the>	<05/09/2013>	<Related artefacts: Decision Log ID: DL04 - Work Plan ID: WPOS>

Summary – Monitor & Control

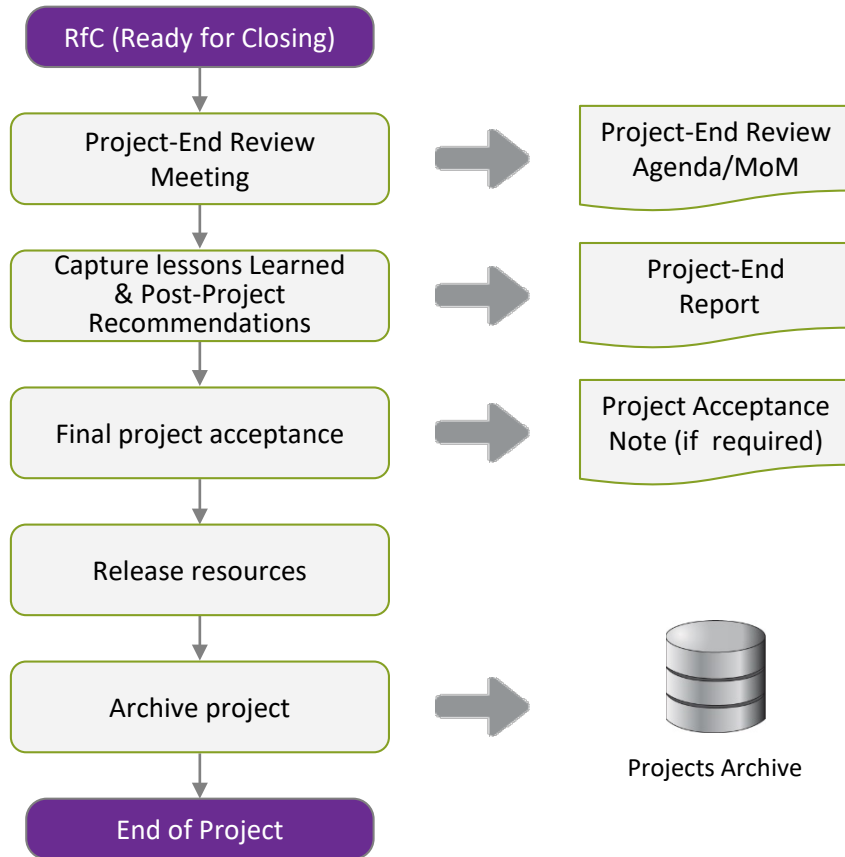
- Monitor project performance
- Control Project variables (compared to plans)
- Use Project Logs to control the project
- Execute all Project Management Plans (Processes)
- Take corrective action -> update plans



Closing Phase

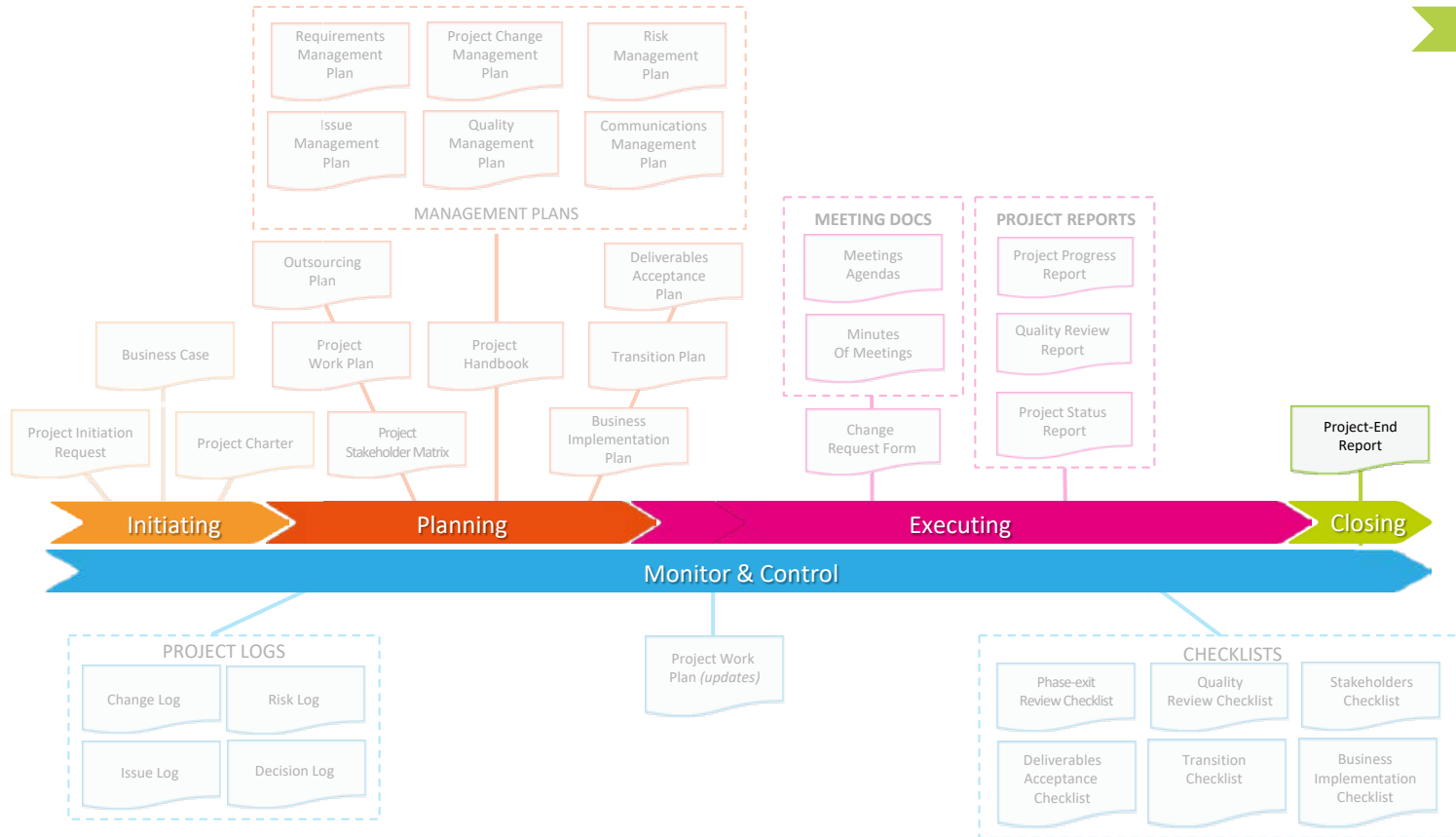


What happens in the Closing Phase



- Transfer deliverables to Project Owner
- Finalises all activities
- Formally close the project.
- Discuss to evaluate project performance
- Capture Lessons Learned and Best Practices in the Project-End Report

The PM² Artefacts Landscape



Wrap-up



- What are your top 3 learnings?
- Which aspects of this course were delivered effectively?
- How can this course be improved?



You are using PM² for your project? We would like to hear about it!
[Contact Us](#) or use the #madewithPM2 tag on your socials