



# Methodology

Highlights and Benefits

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## What is PM<sup>2</sup>?

PM<sup>2</sup> is a Project Management Methodology developed and supported by the European Commission. Its purpose is to enable project teams to manage their projects effectively and deliver solutions and benefits to their organisations and stakeholders.

PM<sup>2</sup> is a light and easy to implement methodology suitable for any type of project. PM<sup>2</sup> has been custom developed to fit the specific needs, culture and constraints of EU Institutions and Public Administrations, but also incorporates elements from globally accepted best practices, standards and methodologies.

PM<sup>2</sup> provides:

- A Project Governance Model (i.e. roles & responsibilities)
- A Project Lifecycle (i.e. project phases)
- A set of Processes (i.e. project management activities)
- A set of Project Artefacts (i.e. templates and guidelines).
- A set of Mindsets (i.e. effective beliefs and behaviours).

## What is Agile PM<sup>2</sup>?

Agile is an approach described by a set of principles and practices for managing projects. Agile appreciates the inherent uncertainty of project environments and creates organisations that are highly adaptive, use adaptive planning and short feedback loops, evolutionary development, early delivery, continuous improvement and rapid response to change.

Agile PM<sup>2</sup> both extends and enhances the PM<sup>2</sup> Methodology with Agile principles and practices and provides an alignment between these practices and corporate governance, programme management, operations, enterprise architecture.



# 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

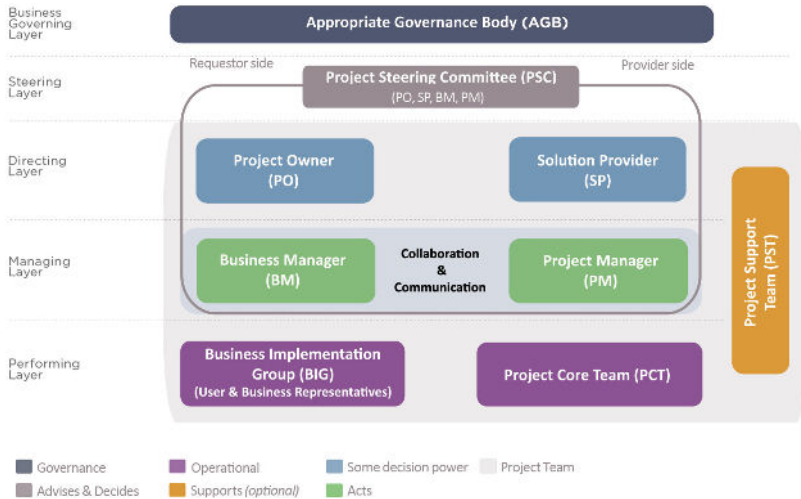
Communication Plan 

## 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 

# 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 Drivers

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>RfE</b>	Ready for Executing
<b>RfC</b>	Ready for Closing

### 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

### ACTIVITIES

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

### ARTEFACTS

- Project Initiation Request
- Business Case
- Project Charter
- Project Logs (setup)

## PLANNING

### ACTIVITIES

- Organise a Kick-off Meeting
- Tailor the PM<sup>2</sup> process
- Assign Roles & Responsibilities
- Elaborate project scope
- Develop work breakdown & project schedule
- Develop Project Plans
- Distribute plans to stakeholders

### ARTEFACTS

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

## EXECUTING

### ACTIVITIES

- Organise a Kick-off Meeting
- Coordinate project execution
- Conduct Meetings
- Assure quality
- Create project reports
- Distribute information
- Ensure deliverables acceptance

### ARTEFACTS

- Executing Kick-off Agenda/MoM
- Meeting Agendas/MoMs
- Change Requests
- Quality Review Report
- Project Status Report
- Project Progress Report
- Deliverables Acceptance Note

## CLOSING

### ACTIVITIES

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

### ARTEFACTS

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

## MONITOR & CONTROL

### ACTIVITIES

- Monitor Project Performance
- Control Schedule
- Control Cost
- Manage Stakeholders
- Manage Requirements
- Manage Project Change
- Manage Risks

### ARTEFACTS

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

### Regularly updated

- Risk Log
- Issue Log
- Decision Log
- Change Log
- Project Work Plan
- Requirements Document

### Checklists

- Phase-exit Review checklist
- Quality Review checklist
- Deliverable Acceptance checklist
- Transition checklist
- Business implementation checklist
- Stakeholder checklist

## CONTACT

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## WEBLINKS

» PM<sup>2</sup> Guide - Open Edition on EU Bookshop

<http://europa.eu/!NG43vU>

» PM<sup>2</sup> Methodology - Open Edition wiki (EU Login)

<http://europa.eu/!Gu76mr>

» Open PM<sup>2</sup> community on Joinup

<http://europa.eu/!vh96rM>

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ISA<sup>2</sup> Programme



### CoEPM<sup>2</sup> - Centre of Excellence in PM<sup>2</sup>

The CoEPM<sup>2</sup> provides the EU Institutions with a complete and high quality Project Management offering, guidance and support for the purpose of enabling the effective and efficient management of project work, serving the objectives of the institutions and respecting the interests and needs of EU citizens.