

PRINCE2®

Quick Reference Card

2009 EDITION



Henny Portman

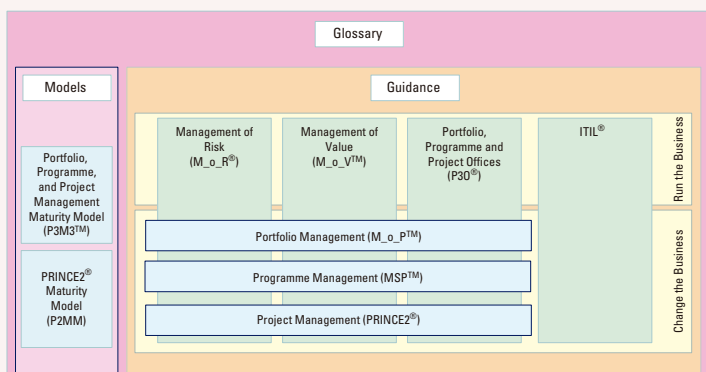


- Tailoring PRINCE2 to the project environment
- A Tailoring example based on PRINCE2 edition 2009
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This PRINCE2® 2009 Edition Quick Reference Card is designed for people familiar with PRINCE2, as a quick reference to PRINCE2 principles, themes, processes, roles and management products. PRINCE2 (Projects in a Controlled Environment) is a structured project management method based on best practice and good practice drawn from thousands of projects – and from the contributions of countless project sponsors, project managers, project teams academics, trainers and consultants.



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Introduction

PRINCE2 principles, tab 3

The purpose of PRINCE2 is to provide a project management method that can be applied regardless of project scale, type, organization, geography or culture. This is possible because PRINCE2 is principles-based. Principles are characterized as:

- Universal in that they apply to every project
- Self-validating in that they have been proven in practice over many years
- Empowering because they give practitioners of the method added confidence and ability to influence and shape how the project will be managed

The principles on which PRINCE2 is based provide a framework of good practice for those people involved in a project.

PRINCE2 themes, tab 4-6

The PRINCE2 themes describe aspects of project management that must be addressed continually, and that require specific treatment for the PRINCE2 processes to be effective. Any project manager who gives thorough attention to these themes will fulfill the role in a professional manner. All seven themes must be applied in a project but they should be tailored according to the scale, nature and complexity of the project concerned.

PRINCE2 processes, tab 7-8

PRINCE2 is a process-based approach for project management. A process is a structured set of activities designed to accomplish a specific objective. It takes one or more defined inputs and turns them into defined outputs. There are seven processes in PRINCE2, which provide the set of activities required to direct, manage and deliver a project successfully.

PRINCE2 management products, tab 9-10

A product that will be required as part of managing the project and establishing and maintaining quality. PRINCE2 describes product description outlines for PRINCE2's defined management products. There are three types of management products: baselines, records and reports.

Tailoring PRINCE2, tab 11-12

The appropriate use of PRINCE2 on any given project, ensuring that there is the correct amount of planning, control, governance and use of the processes and themes.

Reference/source: *Managing Successful Projects with PRINCE2™*, OGC, 2009

PRINCE2 is tailored to suit the project's environment, size, complexity, importance, capability and risk.

A PRINCE2 project has continued business justification

Continued Business Justification

Tailor to Suit the Project Environment

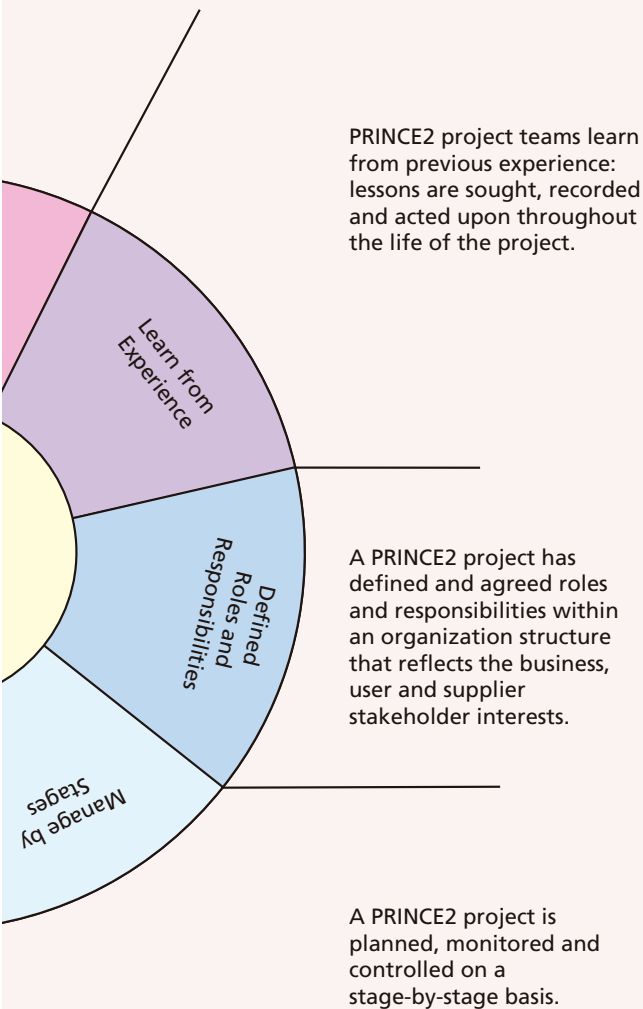
PRINCE2 Principles

A PRINCE2 project focuses on the definition and delivery of products, in particular their quality requirements.

Focus on Products

Manage by Exception

A PRINCE2 project has defined tolerances for each project objective to establish limits of delegating authority.



Theme	Description				
		Corporate or Programme Mgt.	Executive	Senior User(s)	Senior Supplier(s)
Business Case 'Why'	The project starts with an idea which is considered to have potential value for the organization concerned. This theme addresses how the idea is developed into a viable investment proposition for the organization.	Provides the project mandate and defines any standards to which the Business Case needs to be developed. Holds the Senior User(s) to account for realizing the post-project benefits enabled by the project's products. Responsible for the Benefits Review Plan (post-project).	Responsible for the Business Case for the duration of the project. Responsible for the Benefits Review Plan. Over-see the development of a viable Business Case, ensuring that the project is aligned with corporate strategies, and secure the funding for the project.	Responsible for specifying the benefits upon which the Business Case is approved. Ensure the desired outcome of the project is specified. Ensure that the project produces products which deliver the desired outcomes. Ensure that the expected benefits are realized. Provide actual versus forecast benefits statement at the benefits reviews.	Responsible for the Supplier Business Case(s) (if they exist). Confirm that the products required can be delivered within the expected costs and are viable.
Organization 'Who'	Projects are cross-functional so the normal line function structures are not suitable. This theme describes the roles, responsibilities and accountabilities in the temporary PRINCE2 project management team.	Appoint the Executive and (possibly) the Project Manager. Provide information to the project as defined in the Communication Management Strategy.	Appoint the Project Manager. Confirm the appointments to the project management team and structure. Approve the Communication Management Strategy.	Provides user resources. Define and verify user requirements and expectations.	Provide supplier resources.
Quality 'What'	The PRINCE2 approach to ensure that the project's products will be created, that these are fit for purpose, that they meet business expectations and that the desired benefits will be subsequently achieved.	Provide details of corporate or programme quality management system. Provide quality assurance.	Approve the Project Product Description. Approve the Quality Management Strategy. Confirm acceptance of the project product.	Provide user resources for quality activities. Provide the customer's quality expectations and acceptance criteria. Approve the Project Product Description. Approve the Quality Management Strategy. Approve Product Descriptions for key user products. Provide resources to undertake user quality activities and product approval. Provide acceptance of the project product.	Approve the Project Product Description, Quality Management Strategy, quality methods, techniques and tools adopted in product development. Provide resources for quality activities. Approve Product Descriptions for key specialist products.
Plans 'How', 'How much', 'When'	PRINCE2 projects proceed on the basis of a series of approved plans. In PRINCE2, the plans are matched to the needs of personnel at various levels of the organization. They are the means for communication and control throughout the project.	Set project tolerances and document them in the project mandate. Approve Exception Plans when project-level tolerances are forecast to be exceeded. Provide the corporate or programme management planning standards.	Approve the Project Plan. Define tolerances for each stage and approved Stage Plans. Approve Exception Plans when stage-level tolerances are forecast to be exceeded. Commit business resources to Stage Plans (e.g. finance).	Ensure that Project Plans and Stage Plans remain consistent from the user perspective. Commit user resources to Stage Plans	Ensure that Project Plans and Stage Plans remain consistent from the supplier perspective. Commit supplier resources to Stage Plans.

Relevant responsibilities

Project Manager	Team Manager	Project Assurance	Project Support
<p>Prepare the Business Case on behalf of the executive. Conduct impact analysis of any new or revised issues or risks that affect the project's desirability, viability or achievability against the original basis for approving the project. Assess and update the Business Case at the end of each management stage. Assess and report on project performance at project closure.</p>		<p>Assist in the development of the Business Case. Verify and monitor the Business Case against external events and project progress. Monitor project finance on behalf of the customer. Monitor changes to the Project Plan to identify any impact on the needs of the business or the Business Case. Review the impact assessment of potential changes on the Business Case and Project Plan. Verify and monitor the Benefits Review Plan for alignment to corporate or programme management.</p>	<p>The Business Case should have a baseline and therefore be under configuration management. Project Support should advise the Project Manager of any proposed or actual changes to products that affect the Business Case.</p>
<p>Prepare the Communication Management Strategy. Review and update the Communication Management Strategy. Design, review and update the project management team structure. Prepare role descriptions.</p>	<p>Manage project team members. Advise on project team members and stakeholder engagement.</p>	<p>Advise on selection of project team members. Advise on stakeholder engagement. Ensure that the Communication Management Strategy is appropriate and that planned communication activities actually take place.</p>	<p>Provide administrative support for the project management team.</p>
<p>Document customer's quality expectations and acceptance criteria. Prepare the Project Product Description (with users). Prepare the Quality Management Strategy. Prepare and maintain the Product Descriptions. Ensure that Team Managers implement the quality control measures agreed in Product Descriptions and Work Packages.</p>	<p>Produce products consistent with Product Descriptions. Manage quality controls for the products concerned. Assemble quality records. Advise the Project Manager of product quality status.</p>	<p>Advise the Project Manager on the Quality Management Strategy. Assist the Project Board and Project Manager by reviewing the Product Descriptions. Advise the Project Manager on suitable quality reviewers/approvers. Assure Project Board members on the implementation of the Quality Management Strategy, i.e. the proper conduct of the project management and quality procedures.</p>	<p>Provide administrative support for quality controls. Maintain the Quality Register and the quality records. Assist Team Managers and members with the application of project's quality processes.</p>
<p>Design and prepare the plans. Instruct corrective action when Work Package-level tolerances are forecast to be exceeded. Prepare an Exception Plan to implement Project Board's decision in response to Exception Reports.</p>	<p>Prepare Team Plans. Prepare schedules for each Work Package.</p>	<p>Monitor changes to the Project Plan to see whether there is any impact on the needs of the business or the project Business Case. Monitor stage and project progress against agreed tolerances.</p>	<p>Assist with the compilation of Project Plans, Stage Plans and Team Plans. Contribute specialist expertise (e.g. planning tools). Baseline, store and distribute Project Plans, Stage Plans and Team Plans.</p>

Theme	Description				
		Corporate or Programme Mgt.	Executive	Senior User(s)	Senior Supplier(s)
Risk 'What if?'	The identification, assessment and control of uncertainty and, as a result, the improvement of the project's ability to succeed.	Provide the corporate risk management policy and risk management process guide (or similar documents).	Be accountable for all aspects of risk management and, in particular, ensure a project Risk Management Strategy exists. Ensure that risks associated with the Business Case are identified, assessed and controlled. Escalate risks to corporate or programme management as necessary.	Ensure that risks to the users are identified, assessed and controlled (such as the impact on benefits, operational use and maintenance).	Ensure that Risks relating to the supplier aspects are identified, assessed and controlled (such as the creation of project' products).
Change 'What's the impact?'	The identification, assessment and control of any potential and approved issues and changes to the baseline. Issues may be unanticipated general problems, requests for change or instances of quality failure (Off-specification).	Provide the corporate or programme strategy for change control, issue resolution and configuration management.	Determine the Change Authority and change budget. Set the scale for severity ratings for issues. Set the scale for priority ratings for requests for change and off-specifications. Respond to requests for advice from the Project Manager. Make decisions on escalated issues with particular focus on continued business justification.	Respond to requests for advice from the Project Manager. Make decisions on escalated issues with particular focus on safeguarding the expected benefits.	Respond to requests for advice from the Project Manager. Make decisions on escalated issues with particular focus on safeguarding the integrity of the complete solution.
Progress 'Where are we now?' 'Where are we going?' 'Should we carry on?'	The establishment of a mechanism by which to monitor and compare actual achievements against those planned, the control of any unacceptable deviations and the provision of a forecast for evaluating the project's objectives and continuing viability.	Provide project tolerances and document them in the project mandate. Make decisions on Exception Plans when project-level tolerances are forecast to be exceeded.	Provide stage tolerances. Ensure that progress towards the outcome remains consistent from the business perspective. Make decisions on Exception Plans when stage-level tolerances are forecast to be exceeded. Recommend future action on the project to corporate or programme management if the project tolerance is forecast to be exceeded.	Ensure that progress towards the outcome remains consistent from the user perspective.	Ensure that progress towards the outcome remains consistent from the supplier perspective.

Relevant responsibilities

Project Manager	Team Manager	Project Assurance	Project Support
Create the risk Management Strategy. Create and maintain the Risk Register. Ensure that project risks are being identified, assessed and controlled throughout the project lifecycle.	Participate in the identification, assessment and control of risks.	Review risk management practices to ensure that they are performed in line with the project's Risk Management Strategy.	Assist the Project Manager in maintaining the project's Risk Register.
Manage configuration management procedure, assisted by Project Support where possible. Create and maintain the Issue Register, assisted by Project Support where possible. Implement corrective actions.	Implement corrective actions.	Advise on examining and resolving issues.	Administer the configuration management and issue and change control procedures: - Maintain Configuration Item Records - Produce Product Status Accounts - Assist the Project Manager to maintain the Issue Register.
Authorize Work Packages. Monitor progress against Stage Plans. Produce Highlight Reports, End Stage Reports, Lessons Reports and End Project Report. Produce Exception Reports for the Project Board when stage-level tolerances are forecast to be exceeded. Maintain the project's registers and logs.	Agree Work Packages with the Project Manager. Inform Project Support of completed quality activities. Produce Checkpoint Reports. Notify the Project Manager of any forecast deviation from Work Package tolerances.	Verify the Business Case against external events and project progress. Verify changes to the Project Plan to see whether there is any impact on the needs of the business or the Business Case. Confirm stage and project progress against agreed tolerances.	Assist with the compilation of reports. Contribute specialist tool expertise (e.g. planning and control tools). Number, record, store and distribute Issue Reports and Exception Reports. Assist the Project Manager in maintaining the Issue Register and Risk Register. Maintain the Quality Register on behalf of the Project Manager.