

Project Workout Management Architecture

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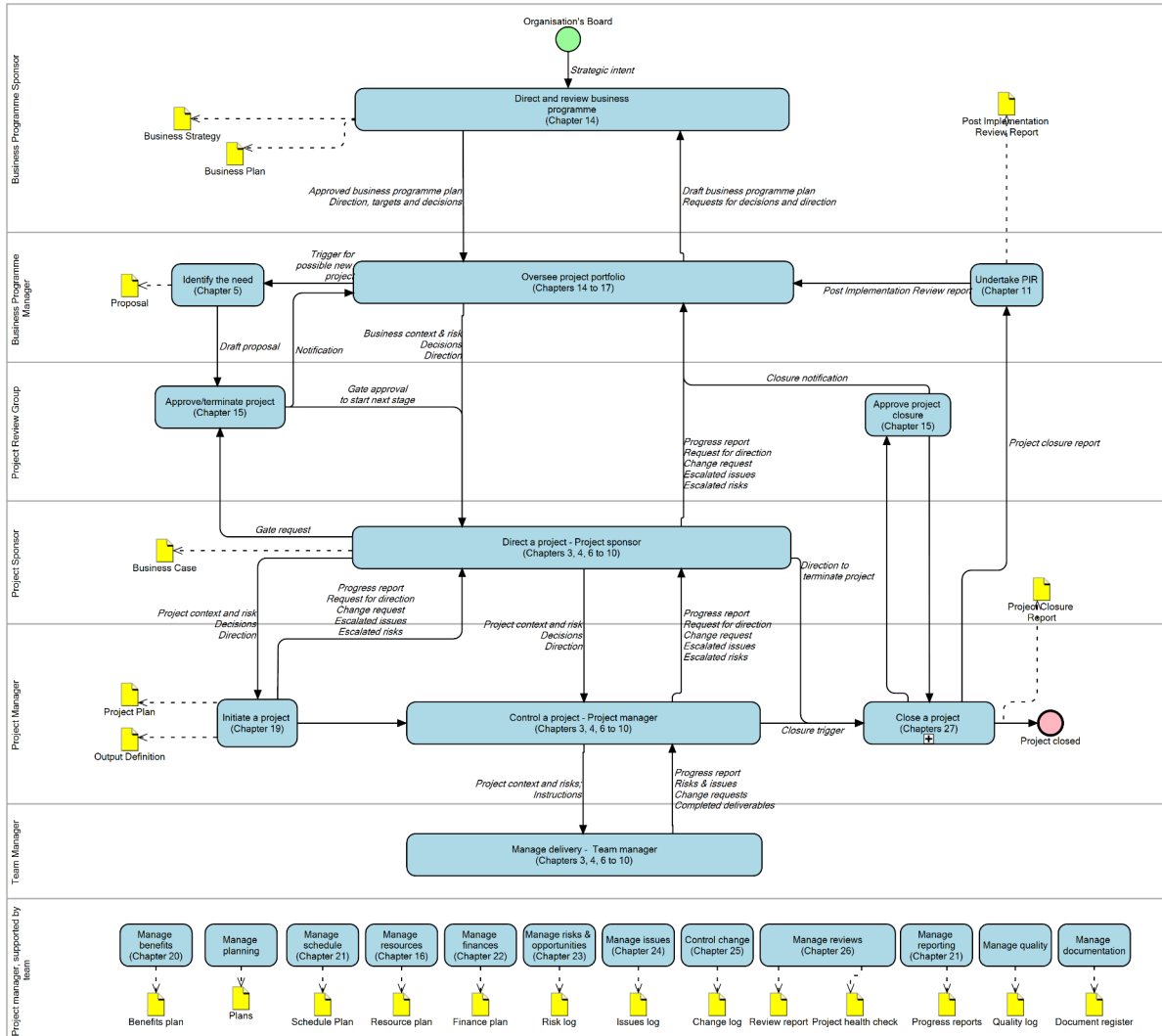
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1 Roles

Role	Description
Business Programme Sponsor	The Business Programme Sponsor is accountable to the Business Strategy and Planning Board for directing the Business Programme, ensuring that the portfolio of projects and activities (Business Program) within his/her scope realizes the required benefits. - Provides business direction to the Business Programme Manager in terms of making decisions, initiating new projects, terminating unwanted projects and resolving issues. - Approves the Business Programme Plan prior to authorization by higher authority. - Ensures that the combined benefits for the Business Programme are realized. - Ensures that the scope of the Business Programme covers the needs of the business. - Directs priorities between contending projects and activities within the Business Programme.
Business Programme Manager	The Business Programme Manager is accountable to the Business Programme Sponsor for day-to-day management of the Business Programme, ensuring that the portfolio is planned and managed to ensure maximum focus and speed of benefit realization. Prepares and maintains a plan of scope, time-scale, benefits and costs for the Business Programme, including reserve for as yet unidentified projects and activities. Selects and manages the portfolio of projects within the Business Programme to realize the required benefits and to ensure that the contributions of all parts of the organization are taken into account. Approves and authorizes projects as delegated. Monitors performance against the Business Programme Plan, initiating corrective action and ensuring the integrity of the plan (including interdependencies). Provides regular progress reports to the Business Programme Sponsor and senior management. Ensures use of best practice methods and organization procedures. Assigns the project sponsor role for each project within the Business Programme. Approves and authorizes projects as delegated. Ensures the projects are progressed, by the project sponsor, through the authorization process.
Project Sponsor	The project sponsor is accountable for realizing the benefits for the organization. He/she will: Ensure a real business need is being addressed by the project; Define and communicate the business objectives in a concise and unambiguous way(see Chapter 20); Ensure the project remains a viable business proposition; Initiate project reviews (see Chapter 26); Ensure the delivered solution matches the needs of the business; Represent the business in key project decisions; Sign off key project deliverables and project closure; Resolve project issues that are outside the control of the project manager; Chair the project board (if one is required); Appoint the project manager and facilitate the appointment of team members; Engage and manage key stakeholders.
Project Manager	The project manager is accountable for managing the project on a day-to-day basis. He/she will: Assemble the project team, with the agreement of appropriate line managers; Prepare the business case, project definition and detailed plans; Define the accountabilities, work scope and targets for each team member; Monitor and manage project progress; Monitor and manage risk and opportunities; Manage the resolution of project issues; Manage the scope of the project and control changes; Forecast likely business benefits; Deliver the project deliverables on time, to budget, at agreed quality; Monitor and manage supplier performance; Communicate with stakeholders; Manage the closure of the project.

Role	Description
Team Manager	Team Managers are accountable to the project manager. The role of team manager is to: Be accountable for such deliverables as are delegated to them by the project manager, ensuring they are completed on time and to budget; Liaise and work with other team managers and members in the carrying out of their work; Contribute to and review key project documentation; Monitor and manage progress on their delegated work scope; Manage the resolution of issues, escalating any which they can not deal with to the project manager; Monitor changes to their work scope, informing the project manager of any which require approval; Monitor risk associated with their work scope; Be responsible for advising the appropriate team managers and/or project manager of potential issues, risks, or opportunities they have noticed.

2 Diagram



3 Steps

Role	Preceding	Links In	Information In	Step	Information Out	Links Out	Succeeding
Business Programme Sponsor				Organisation's Board (Event)		Strategic intent	Direct and review business programme (Chapter 14)
Business Programme Sponsor	Oversee project portfolio (Chapters 14 to 17) Organisation's Board	Draft business programme plan Requests for decisions and direction Strategic intent		Direct and review business programme (Chapter 14) (Activity)	Business Plan Business Strategy	Approved business programme plan Direction, targets and decisions	Oversee project portfolio (Chapters 14 to 17)
Business Programme Manager	Oversee project portfolio (Chapters 14 to 17)	Trigger for possible new project		Identify the need (Chapter 5) (Activity)	Proposal	Draft proposal	Approve/ terminate project (Chapter 15)

Role	Preceding	Links In	Information In	Step	Information Out	Links Out	Succeeding
Business Programme Manager	<p>Direct a project - Project sponsor (Chapters 3, 4, 6 to 10)</p> <p>Direct and review business programme (Chapter 14)</p> <p>Undertake PIR (Chapter 11)</p> <p>Approve project closure (Chapter 15)</p> <p>Approve/ terminate project (Chapter 15)</p>	<p>Progress report</p> <p>Request for direction Change request</p> <p>Escalated issues</p> <p>Escalated risks</p> <p>Approved business programme plan</p> <p>Direction, targets and decisions</p> <p>Post Implementation Review report</p> <p>Closure notification</p> <p>Notification</p>		<p>Oversee project portfolio (Chapters 14 to 17)</p> <p>(Activity)</p>		<p>Business context & risk Decisions Direction</p> <p>Draft business programme plan</p> <p>Requests for decisions and direction</p> <p>Trigger for possible new project</p>	<p>Direct a project - Project sponsor (Chapters 3, 4, 6 to 10)</p> <p>Direct and review business programme (Chapter 14)</p> <p>Identify the need (Chapter 5)</p>
Project Manager	<p>Direct a project - Project sponsor (Chapters 3, 4, 6 to 10)</p>	<p>Project context and risk</p> <p>Decisions</p> <p>Direction</p>		<p>Initiate a project (Chapter 19)</p> <p>(Activity)</p>	<p>Project Plan</p> <p>Output Definition</p>	<p>Progress report</p> <p>Request for direction Change request</p> <p>Escalated issues</p> <p>Escalated risks</p>	<p>Control a project - Project manager (Chapters 3, 4, 6 to 10)</p> <p>Direct a project - Project sponsor (Chapters 3, 4, 6 to 10)</p>

Role	Preceding	Links In	Information In	Step	Information Out	Links Out	Succeeding
Project Review Group	Direct a project - Project sponsor (Chapters 3, 4, 6 to 10) Identify the need (Chapter 5)	Gate request Draft proposal		Approve/terminate project (Chapter 15) (Activity)		Gate approval to start next stage Notification	Direct a project - Project sponsor (Chapters 3, 4, 6 to 10) Oversee project portfolio (Chapters 14 to 17)
Project Sponsor	Control a project - Project manager (Chapters 3, 4, 6 to 10) Oversee project portfolio (Chapters 14 to 17) Approve/ terminate project (Chapter 15) Initiate a project (Chapter 19)	Progress report Request for direction Change request Escalated issues Escalated risks Business context & risk Decisions Direction Gate approval to start next stage Progress report Request for direction Change request Escalated issues Escalated risks		Direct a project - Project sponsor (Chapters 3, 4, 6 to 10) (Activity)	Business Case	Project context and risk Decisions Direction Gate request Progress report Request for direction Change request Escalated issues Escalated risks Direction to terminate project Project context and risk Decisions Direction	Control a project - Project manager (Chapters 3, 4, 6 to 10) Approve/ terminate project (Chapter 15) Oversee project portfolio (Chapters 14 to 17) Close a project (Chapters 27) Initiate a project (Chapter 19)

Role	Preceding	Links In	Information In	Step	Information Out	Links Out	Succeeding
Project Manager	<p>Manage delivery - Team manager (Chapters 3, 4, 6 to 10)</p> <p>Direct a project - Project sponsor (Chapters 3, 4, 6 to 10)</p> <p>Initiate a project (Chapter 19)</p>	<p>Progress report Risks & issues Change requests Completed deliverables</p> <p>Project context and risk Decisions Direction</p>		<p>Control a project - Project manager (Chapters 3, 4, 6 to 10)</p> <p>(Activity)</p>		<p>Project context and risks; Instructions</p> <p>Progress report Request for direction Change request Escalated issues Escalated risks Closure trigger</p>	<p>Manage delivery - Team manager (Chapters 3, 4, 6 to 10)</p> <p>Direct a project - Project sponsor (Chapters 3, 4, 6 to 10)</p> <p>Close a project (Chapters 27)</p>
Team Manager	<p>Control a project - Project manager (Chapters 3, 4, 6 to 10)</p>	<p>Project context and risks; Instructions</p>		<p>Manage delivery - Team manager (Chapters 3, 4, 6 to 10)</p> <p>(Activity)</p>		<p>Progress report Risks & issues Change requests Completed deliverables</p>	<p>Control a project - Project manager (Chapters 3, 4, 6 to 10)</p>
Project Manager	<p>Control a project - Project manager (Chapters 3, 4, 6 to 10)</p> <p>Direct a project - Project sponsor (Chapters 3, 4, 6 to 10)</p> <p>Approve project closure (Chapter 15)</p>	<p>Closure trigger Direction to terminate project</p>		<p>Close a project (Chapters 27)</p> <p>(Activity)</p>	<p>Project Closure Report</p>	<p>Project closure report</p>	<p>Undertake PIR (Chapter 11)</p> <p>Project closed</p> <p>Approve project closure (Chapter 15)</p>
Project Manager	<p>Close a project (Chapters 27)</p>			<p>Project closed</p> <p>(Event)</p>			

Role	Preceding	Links In	Information In	Step	Information Out	Links Out	Succeeding
Business Programme Manager	Close a project (Chapters 27)	Project closure report		Undertake PIR (Chapter 11) (Activity)	Post Implementation Review Report	Post Implementation Review report	Oversee project portfolio (Chapters 14 to 17)
Project manager, supported by team				Manage benefits (Chapter 20) (Activity)	Benefits plan		
Project manager, supported by team				Manage planning (Activity)	Plans		
Project manager, supported by team				Manage schedule (Chapter 21) (Activity)	Schedule Plan		
Project manager, supported by team				Manage resources (Chapter 16) (Activity)	Resource plan		
Project manager, supported by team				Manage finances (Chapter 22) (Activity)	Finance plan		
Project manager, supported by team				Manage risks & opportunities (Chapter 23) (Activity)	Risk log		
Project manager, supported by team				Manage issues (Chapter 24) (Activity)	Issues log		

Role	Preceding	Links In	Information In	Step	Information Out	Links Out	Succeeding
Project manager, supported by team				Control change (Chapter 25) (Activity)	Change log		
Project manager, supported by team				Manage reviews (Chapter 26) (Activity)	Review report Project health check		
Project manager, supported by team				Manage reporting (Chapter 21) (Activity)	Progress reports		
Project manager, supported by team				Manage quality (Activity)	Quality log		
Project manager, supported by team				Manage purchasing (Activity)			
Project manager, supported by team				Manage documentation (Activity)	Document register		
Project Review Group	Close a project (Chapters 27)			Approve project closure (Chapter 15) (Activity)		Closure notification	Close a project (Chapters 27) Oversee project portfolio (Chapters 14 to 17)

4 Step details

Step	Description
Organisation's Board (Event)	The organisation's board should set the strategic direction for the organisation and targets to be met.
Direct and review business programme (Chapter 14) (Activity)	Throughout the duration of the business programme, the business programme should ensure that the totality of the outputs and benefits meets the overall business needs of the organisation as a whole.
Identify the need (Chapter 5) (Activity)	In order to have a controlled start to a project, preparatory work should be done prior to the formal start of the project to prepare a proposal for the project. In all cases, the sponsoring group in the organisation should identify a senior manager (project sponsor) who will be accountable for the realisation of the benefits which will derive from the project and who will establish the project objectives. The result of this work should be a statement of the business objectives, expected outcomes and outline case for the project. This information should be used as the basis for a decision at the first project gate to start the first stage of the project (see below). See Chapter 5 for more about this activity.
Oversee project portfolio (Chapters 14 to 17) (Activity)	Throughout the duration of the business programme, the business programme manager should ensure that projects are initiated when needed, delivery is proceeding to time and that the outputs will meet the business needs. Corrective action and direction should be taken if the business programme is unlikely to meet its stated objectives.
Initiate a project (Chapter 19) (Activity)	You need to set up a project properly from the start to ensure that control is established. There are five key activities for you to undertake when setting up a project: 1 Set up the project team. 2 Prepare a project definition and business case 3 Prepare a project plan. 4 Define your project organization. 5 Engage your stakeholders. See Chapter 19 for more about this activity.
Approve/terminate project (Chapter 15) (Activity)	This activity should comprise two aspects: - Approving the start of a project, new phase of a project and closure. - Terminating, suspending and reinstating a project. The purpose of approving the start of a project or phase is to ensure that the project and each phase of the project are initiated in a controlled manner and that the project is closed in a controlled manner. The purpose of terminating, suspending or reinstating a project is to change the status of the project a result of the project becoming unviable or risks unacceptably high. See Chapter 15 for more about this activity.
Direct a project - Project sponsor (Chapters 3, 4, 6 to 10) (Activity)	Throughout the project, the project sponsor should ensure the project is viable and still required. He/she should seek direction from the programme sponsor or manager as and when needed and provide direction to the project manager as appropriate.
Control a project - Project manager (Chapters 3, 4, 6 to 10) (Activity)	Throughout the project the project manager should ensure that the required outputs are fit for purpose and likely to enable the realisation of the required benefits. This includes managing the project through its stages and applying the support processes as and when needed. See Chapters 3, 4, 6 to 10 for more on this activity.

Step	Description
Manage delivery - Team manager (Chapters 3, 4, 6 to 10) (Activity)	The team manager should ensure that all deliverables within the assigned work package are completed on time, to costs and at the appropriate quality. This includes applying the support processes as and when needed. See Chapters 3, 4, 6 to 10 for more on this activity.
Close a project (Chapters 27) (Activity)	The objective of project closure is to ensure that a project is closed down in a controlled and organized way and all accountabilities relating to it have been discharged or handed over to the appropriate authorities. Closure is the formal "end-point" of a project, either because it is completed or because it has been terminated. Termination may occur because the project is no longer viable or because the risks associated with it have become unacceptably high.
Project closed (Event)	This project is now formally closed
Undertake PIR (Chapter 11) (Activity)	When sufficient time has elapsed for the benefits realized and operational measures are representative, the business programme manager should ensure the project sponsor undertakes a review to determine the extent that actual benefits being realized match expectation in the business case, the operational performance and practice matches expectations and what corrective action, if any, is required to ensure the outcome meets that defined in the business case. See Chapter 11 for more about this activity.
Manage benefits (Chapter 20) (Activity)	The purpose of benefits management is to ensure that the benefits expected from undertaking a project are defined, measurable and realistic and, if realized, will ensure the project achieves its objectives.
Manage planning (Activity)	The purpose of planning is to ensure that the outputs from the project are likely to be delivered in sufficient time, within cost and at a required quality, such that the project's benefits will be realized. The project manager should be accountable for creating and using the project plan, assisted and advised as necessary by the project sponsor and project team.
Manage schedule (Chapter 21) (Activity)	The purpose of schedule management is to ensure the project deliverables are developed on time.
Manage resources (Chapter 16) (Activity)	The purpose of resource management is to ensure that the project has sufficient resources of the right skills to undertake the work.
Manage finances (Chapter 22) (Activity)	The purpose of financial management is to ensure the project costs are kept within acceptable limits to ensure the project is financially viable.
Manage risks & opportunities (Chapter 23) (Activity)	The purpose of risk management is to ensure the likelihood of the project objectives being achieved is increased. Risk is any potential uncertainty, threat, or occurrence which may prevent you from achieving your defined business objectives and benefits. It may affect time-scale, cost, quality or benefits.
Manage issues (Chapter 24) (Activity)	The purpose of issues management is to ensure exceptional events are resolved such that the business objectives of the project can still be achieved. Issues management is the process for recording and handling any event or problem which either threatens the success of a project or represents an opportunity to be exploited.

Step	Description
Control change (Chapter 25) (Activity)	The purpose of change control is to ensure only beneficial changes are introduced into the project . Controlling change does not mean preventing change.
Manage reviews (Chapter 26) (Activity)	The purpose of reviews is the assure the sponsor that the project will achieve its objectives. Reviews are an indispensable part of good project management, reassuring you, if you are the project sponsor, that the benefits you require will in fact be realized and, if you are the project manager, giving you an independent view on the effectiveness with which you are running the project
Manage reporting (Chapter 21) (Activity)	The purpose of reporting is to ensure the sponsor, team and other selected stakeholders are aware of the current situation on a project and prompted to take actions, when necessary.
Manage quality (Activity)	The purpose of quality management is to ensure that the outputs from the project are fit for purpose such that the project objectives can be achieved.
Manage purchasing (Activity)	The purpose of procurement management is to ensure that any products or services which are bought as part of the resourcing of. or outputs from, the a project, are of the appropriate quality and represent value for money for the procuring organisation.
Manage documentation (Activity)	The purpose of documentation management is to ensure that all documentation relating to the project is tracked, reviewed, approved and version controlled effectively, such there is no doubt as to what version of any document is to be used by the team or stakeholders.
Approve project closure (Chapter 15) (Activity)	This activity should comprise two aspects: - Approving the start of a project, new phase of a project and closure. - Terminating, suspending and reinstating a project. The purpose of approving the start of a project or phase is to ensure that the project and each phase of the project are initiated in a controlled manner and that the project is closed in a controlled manner. The purpose of terminating, suspending or reinstating a project is to change the status of the project a result of the project becoming unviable or risks unacceptably high. See Chapter 15 for more about this activity.

5 Information

Information	State	Description
Business Plan		Overall business plan for the business programme including objectives, benefits and constraints.
Business Strategy		Governing principles for how the business plan is constructed.
Benefits plan		Plan showing overall benefits for the programme or project.
Schedule Plan		Plan showing overall time-scales for the programme, project or work package. A template is provided on the CD
Resource plan		Plan showing overall resource needs for the programme, project or work package.
Finance plan		Plan showing overall costs for the programme, project or work package. If the project is revenue earning, then income should also be tracked.
Risk log		Log of all risks which may impact the business objectives. A template is provided on the CD
Issues log		Log of all issues which may impact the business objectives. A template is provided on the CD
Change log		Log of all change requests and their status. A template is provided on the CD
Review report		Report resulting from a review ,which provides assurance that the project will meet its business objectives. It should include a summary of the findings and recommendations.
Plans		A plan comprises the integration of the schedule, costs, resource and scope for a project or work package.
Progress reports		Report on the status of the project or work package which is the subject of the report.Report on the status of the project or work package which is the subject of the report.
Quality log		Log of adherence to quality standards for the project or work package.
Document register		Register of all version controlled documentation for the project or work package.
Proposal		The Proposal is a very brief document (one to five pages) which outlines the need the project will meet, what it is intended to produce (if known), its benefits, and how it fits with current strategy. If known, the impact on the organisation (market, technology and operational), broad estimates of benefits and cost, and required time to completion are also included. A template is provided on the CD
Business Case		The Business Case contains the business rationale for the project. It is the document which outlines WHY you need the project, WHAT options you intend to work on, HOW you will do it, and WHO is needed to make it happen. It also answers the question HOW MUCH? and hence is used to authorise the funding for at least the next stage of the project. The Initial Business Case does not comprise a full analysis, but only sufficient to enable you to decide if it is worthwhile continuing the project. The Full Business Case provides the definitive appraisal for the project. A template is provided on the CD

Information	State	Description
Project Plan		The Project Plan is a key appendix or supporting document to the business case and defines the schedule, cost, and resource requirements for the project. This is defined in summary to completion of the project and in detail for the Detailed Investigation Stage.
Output Definition		The Output Definition is the fundamental document set describing the output of the project in terms of process, organisation, systems, technology and culture. It is the document which integrates all the individual system, process and platform requirements. It also specifies how they will work together. The document set will continue to develop as the project proceeds and will be handed over to the manager(s) of any operational parts before the project is completed.
Project Closure Report		The Project Closure Report contains the notes of solution handover and project closure, including 'lessons learned' from the project in terms of how the processes, organisation, systems and team worked (i.e. the efficiency of the project). A terms of reference for the Post-Implementation Review is also included. A template is provided on the CD
Post Implementation Review Report		The Post-Implementation Review (PIR) report assesses the success of the project against predefined criteria given in the business case and confirmed in the terms of reference for the PIR. It assesses how effective the project was in meeting its objectives and includes recommendations for improvements. A template is provided on the CD
Project health check		