



PRINCE2[®]

7th Edition

Masterclass

Handbook



Handbook 11

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Module 11

Lesson 1

Plans practice purpose

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The plans practice – Module 11

The plans practice purpose is to **facilitate communication and control** by defining the **products** to be delivered, the means to deliver them, and estimates to satisfy the project business case

Planning horizon

Levels of plans

Project plan

Stage plan

Team plan

Exception plan

Stages and work packages

Tolerances in planning

Preparing estimates

Preparing a schedule

Preparing the budget



The product-based planning technique (Module 10)

Analysing risks

Documenting the plan

Supporting techniques

Organizational context

Commercial context

Delivery method

Sustainability

Scale

Management products

Practice key roles

Relationships with principles

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Plans practice learning outcomes - 1

FOUNDATION: Explain the purpose of the plans practice

Describe the key relationships between the plans practice and the principles

Explain the purpose of the key management products required to support the plans practice:

- Work package description
- Project product description
- Plan (including project, stage, team & exception plan)

Define key concepts related to the plans practice:

- schedule
- dependency
- project plan
- stage plan
- team plan
- exception plan
- scope



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Plans practice learning outcomes - 2

FOUNDATION: Describe the PRINCE2 technique for the plans practice

Describe the guidance for effective management of plans:

- the planning horizon
- project stages
- product-based planning
- using tolerances to manage constraints
- delivery sustainability

PRACTITIONER: Apply the PRINCE2 plans practice, demonstrating an understanding of:

a) The key management products required to support the plans practice

- plan (project, stage, team & exception plans)
- project product description
- work package description



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Plans practice learning outcomes - 3

PRACTITIONER:

b) The areas of focus for key roles associated with the plans practice

c) Effective management and associated techniques

Analyse whether an approach to applying the plans practice is effective and fit for purpose, taking into consideration:

- the PRINCE2 principles, and the effective management and associated techniques of the practice
- tailoring to the project's environment/context



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The plans practice syllabus

By the end of Module 11, you will understand:

Plan purpose and development
Using plans as a control
Planning horizon
Plan levels
The project plan
Management by stages
Stage type and length
The stage plan
The team plan
The exception plan
Stages and work packages
Tolerances in planning
Product-based planning
Preparing estimates
Preparing a schedule

Preparing a budget
Analysing risks
Documenting the plan
Prioritizing in plans
Project scheduling
Critical path and critical chain
Estimating techniques
Organizational context
Commercial context
Plan delivery methods
Plan sustainability
Plan scale
Plan management product
Plans practice key roles
Relationships with principles



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Plan definition and purpose

The definition of a plan

A **proposal** that outlines the what, where, when, how, and who of the project (or a subset of its activities)

In **PRINCE2**, there are the following types of plans: **project plan**, **stage plan**, **team plan**, and **exception plan**

Plans enable understanding and communication**Plans integrate three perspectives:**

- the user's expectations of the products to be delivered
- the benefits to be realized
- the project management team's assessment of the most effective approach to meet these expectations

The business support for the project includes the commitment of funding, people, and resources



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Plan development - 1

The development of a plan enables the project management team to **assess and understand**:

why: the user's driving requirements and the benefits they expect to realize

what: the products to be delivered and their associated acceptance criteria and quality specifications

how: the delivery method and any constraints

when: the sequence and estimated duration of delivery activities

where: the locations and facilities involved in delivery and acceptance

who: the required skills and responsibilities of the project team and how they will be organized

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Plan development - 2

The development of a plan enables the project management team to **assess and understand**:

Issues that affect the accuracy or realism of the plan

Risks that may be encountered during delivery

An approved and baselined plan enables communication between the project management team and its stakeholders and within the members of the project team

How much is the **estimated cost** of the agreed products and the associated delivery and management activities?



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Module 11

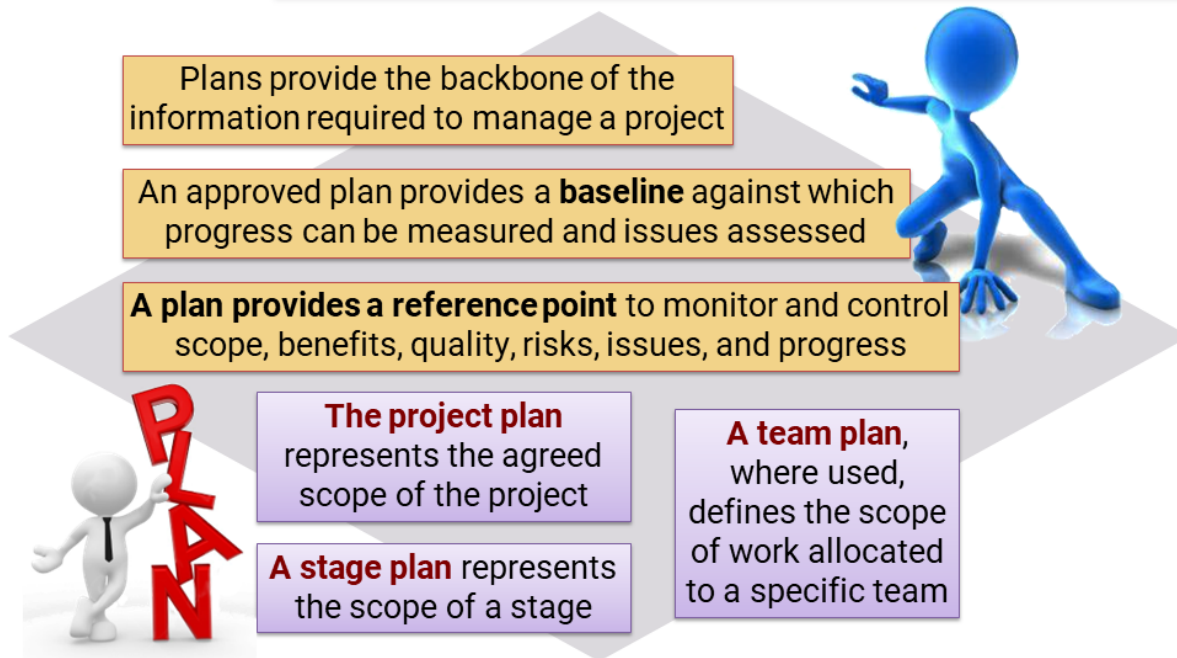
Lesson 2

The planning horizon

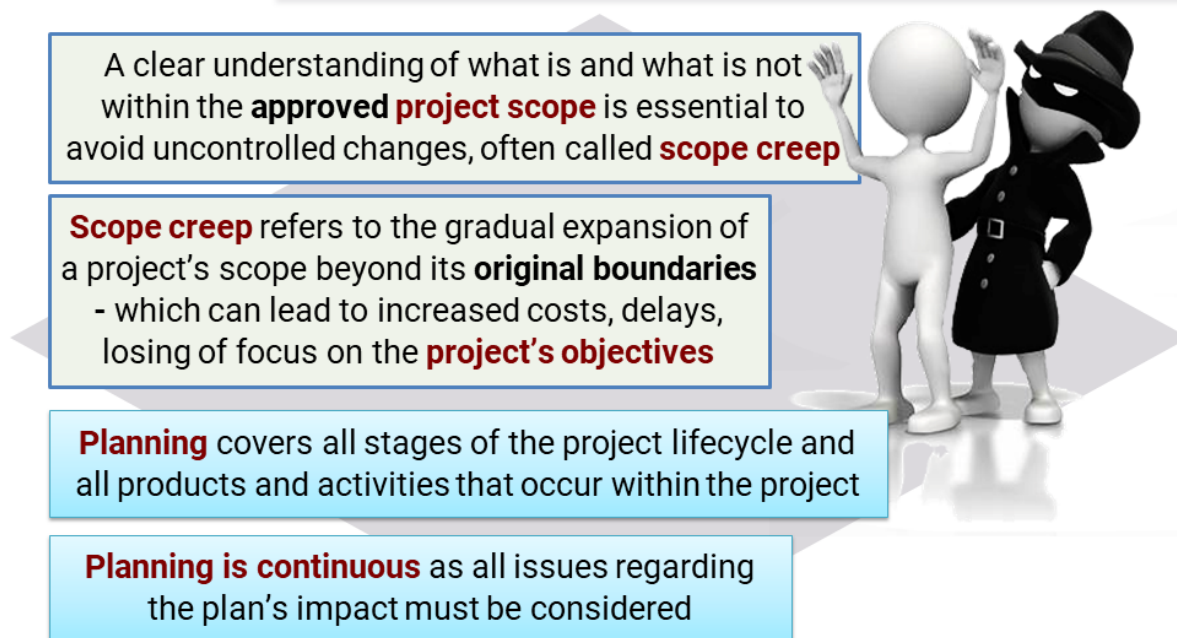
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Plans enable control - 1

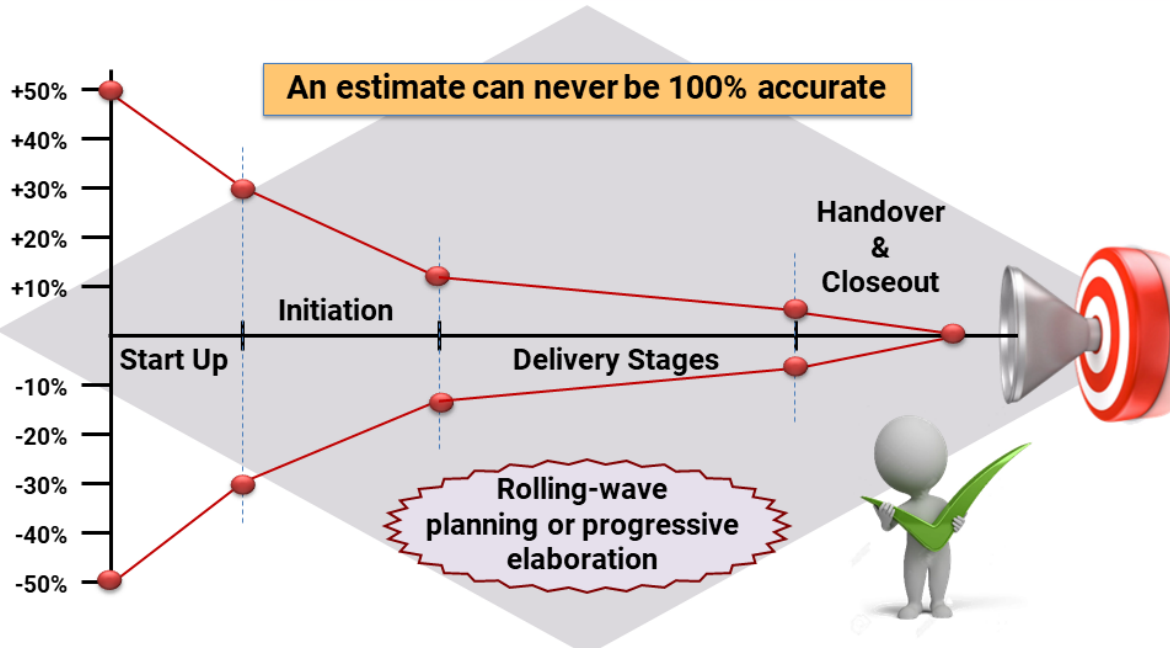
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Plans enable control - 2



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The cone of uncertainty

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The planning horizon - 1

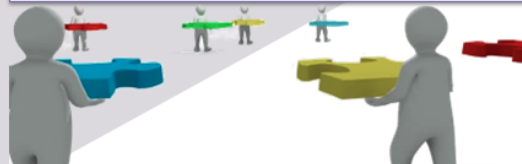
Plans are always based on **estimates**

Estimates can become increasingly uncertain due to project length, product types, delivery model, or the complexity or dynamic of the project environment

So, planning activities and **plans** should only cover a period whereby it is possible to plan with **reasonable confidence**



This period, known as the **planning horizon**, is the timeframe within which the **project's scope, activities, and resources** can be reasonably predicted and planned



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The planning horizon - 2

The planning horizon will impact the level of detail that can be planned

A project plan with **long planning horizon** will be a **high-level plan**

The stage plan has a **shorter planning horizon**, and **more detail** can be planned

Plans that **extend beyond the planning horizon** incorporate **uncertainties** that introduce their own **risks** to the project

For example, a plan detailing day-to-day activities of team members a year in the future will **almost certainly be inaccurate**



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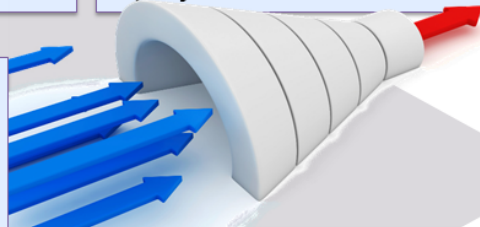
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The planning horizon - 3

The PRINCE2 manage by stages principle addresses the need to keep plans within reasonable **planning horizons**

and that it is usually not possible to plan the whole project from the outset

This approach involves breaking the project into **manageable stages**, each with its **own plan**, which allows for more **accurate planning and control**



All PRINCE2 plans have the same fundamental structure - what differs is the purpose, scope, and level of detail

For example, a **project plan** covering the entire project lifecycle is **less detailed** than a **stage plan** covering a single stage

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The planning horizon - 4

To deal with the **planning horizon**, a **PRINCE2** project has:

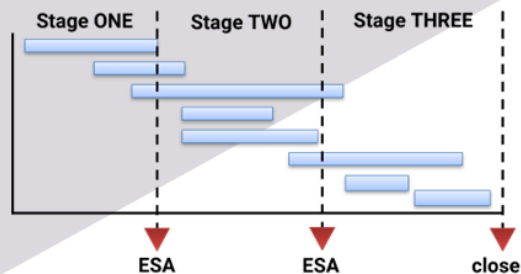
A project plan

A high-level description of how and when the objectives will be achieved

It shows the **significant products, activities**, and required **people** and **resources**

It provides a **baseline** against which to monitor progress throughout the project's life

A **stage plan** for the current stage is a detailed document based on more **precise estimates** that are achievable within the **planning horizon**



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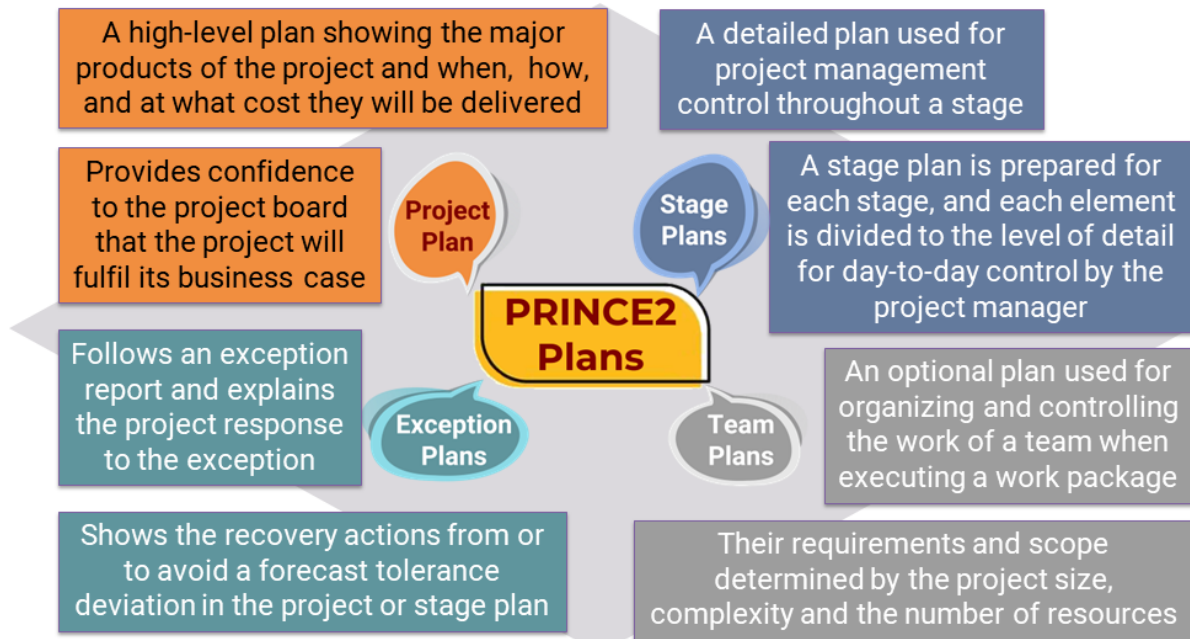
Lesson 3

Plan levels

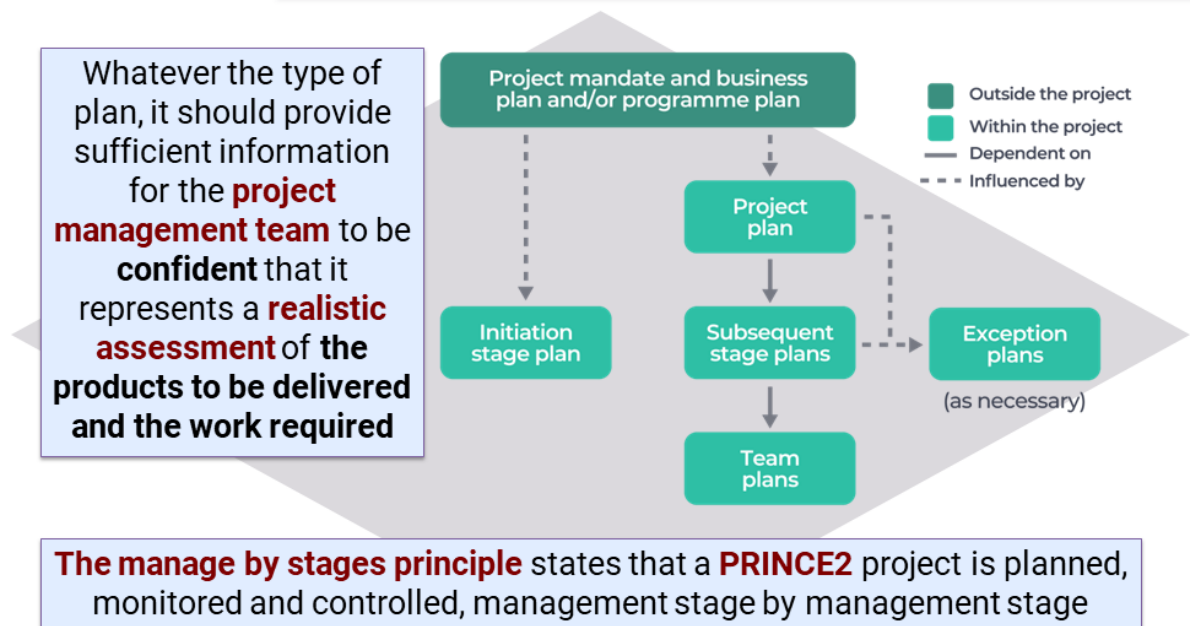
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PRINCE2 Plans

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Plan levels



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The project plan - 1

A project plan

Provides confidence to the project board that the project will fulfil its **business case** and ...

... and informs the **project management team** that they have a **viable approach** to deliver the **required products** within the **approved resources and tolerances**

Should identify the **number of stages**, details of the **stage boundaries** ...

... and proposed **work packages** into which the **product delivery** activities will be organized

The goal of the **project plan** is to give the **project board** and the **project manager** **confidence** in proceeding with delivery



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The project plan - 2

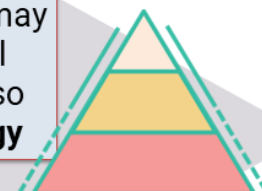
A project plan

These **work packages** typically represent the top level of the **project's work breakdown structure**, and the **project plan** should state whether each work package will be delivered **sequentially or iteratively**

In an **iterative-incremental project**, some **work packages** may be detailed in a **subsequent stage plan**, but their general purpose and scope should be stated in the **project plan**, so the stage plan aligns with the **overall project plan strategy**

The **project plan** is created during the **initiation stage** and baselined after project board approval

In the **managing a stage boundary** process, any changes to the **project plan** needs project board approval then updated and baselined



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Management by stages - 1

Determining how to **divide the project into stages** is a matter of balancing:

the delivery method (iterative-incremental or linear-sequential)

the sequence of delivery activities

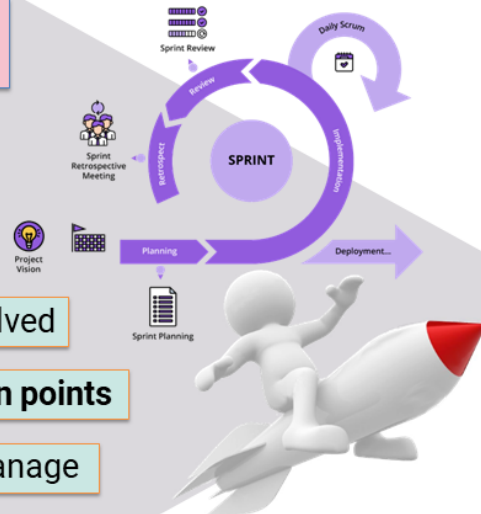
the type of people and resources involved

the number and timing of key **decision points**

the amount of risk the project can manage

how far ahead in the project it is sensible to plan

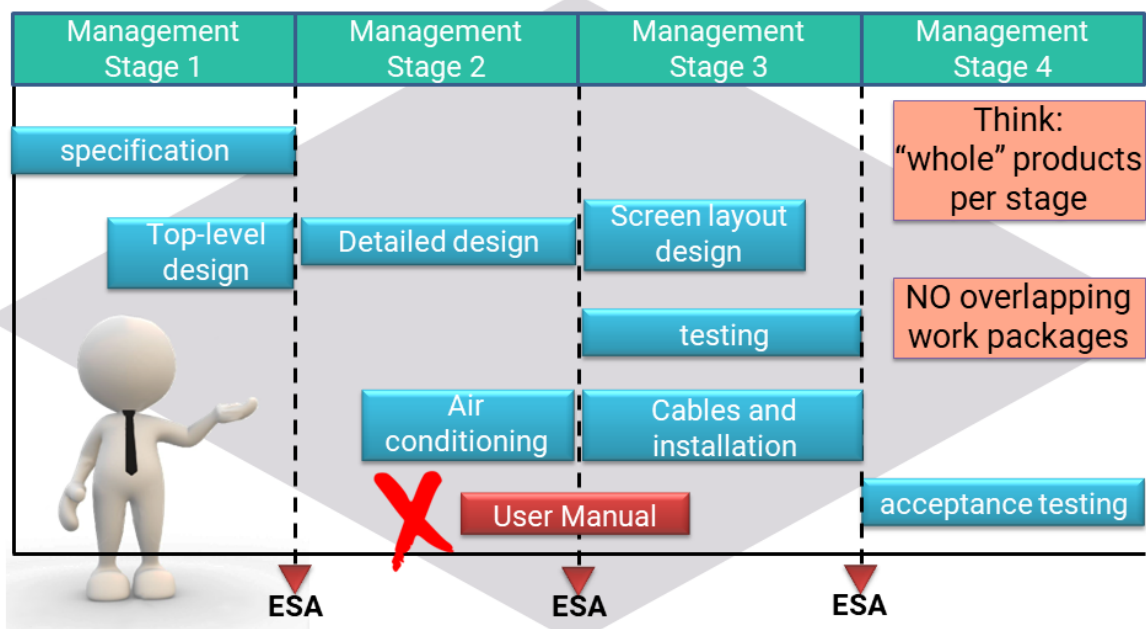
PRINCE2 structures the management of the project on a stage-by-stage basis



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Management by stages - 2



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Module 11

Lesson 4

Stages and the Stage Plan

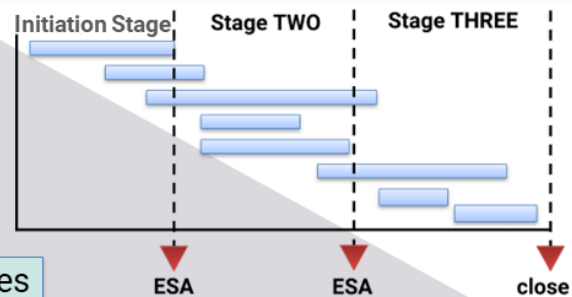
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The number of stages - 1

The number of stages can vary, based on the nature of the products and the necessary delivery activities

A greater number of stages increases the degree of control, but every stage boundary requires effort to manage ...



... therefore, there is a trade-off between the degree of control and the level of management overhead on the project

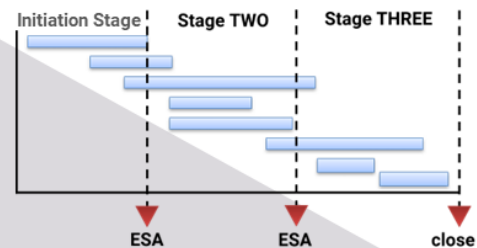
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The number of stages - 2

For a simple project with a small number of well-understood products and mature delivery method, **only two stages may be required**

These are an initiation stage to prepare the **project initiation documentation** and a **single delivery stage**



For a larger project with a complex set of products and a mix of delivery methods, multiple delivery stages, each with their own products and stage boundaries, may be required

Combined with the **focus on products** principle, **managing by stages** helps the **project management team** to plan and deliver **what** is required **when** it is required

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The length of stages - 1

Determining the appropriate stage length is a matter of assessing the following:

Level of complexity

if the number and dependencies among delivery activities is high, a shorter stage may help avoid encountering exceptions to the approved tolerances

Level of risk

stages are useful in providing control over high-risk projects

Stage breaks can be inserted at key points where risks to the project can be reviewed before major commitment of resources

Planning horizon

if there is significant uncertainty in the estimates of resources or of the duration of activities, a shorter stage can allow these estimates to be refined in the next stage plan



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The length of stages - 2

appropriate
decision
points

stage boundaries should be aligned with project board critical decisions (such as whether and how to continue after delivery of a prototype) or business layer decisions or events (such as a business planning cycle)

alignment with
programme
activities

programmes may be organized around groups of projects structured around distinct changes in capability and delivery tranches

The programme may require the project to align the end of a stage with the end of a programme tranche

The length of stages does not have to be uniform throughout the project - the design or prototyping stages for a new system, for example, may be much shorter than the build stage



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A stage plan - 1

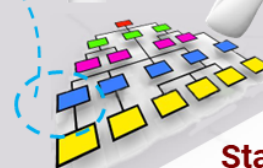
A detailed stage plan (one for each stage), is used for **project management control** throughout a stage

The stage plan is like the structure of the **project plan**, but each element is divided into the level of detail required for **day-to-day control** by the **project manager**

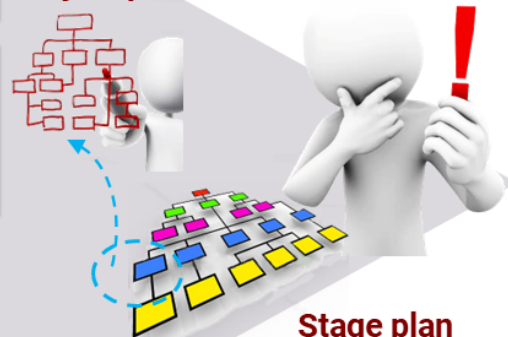
The stage plan information should be **traceable** back to the **project plan**

An indicator that a project is at risk of **scope creep** is when **activities or products** in a **stage plan** cannot be linked to a **high-level element** within the **project plan**

Project plan



Stage plan



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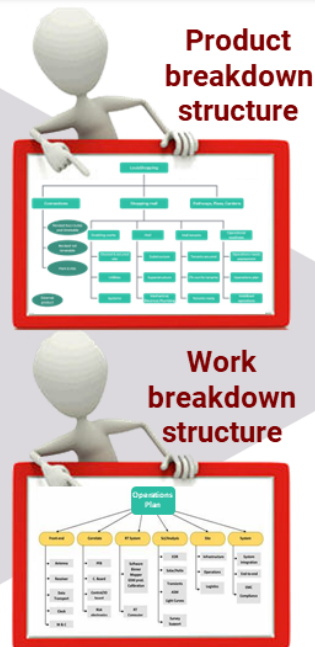
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A stage plan - 2

Each **stage plan** should include a **product breakdown structure** showing the **products' scope and relationships**

It should also include a **work breakdown structure** for the stage, identifying the **major activities** to be performed during the stage and the **people and resources** involved in each of these activities

A **WBS** is a hierarchy of all work done during a project/stage, and links to the **product breakdown structure** and the **work packages**



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A stage plan - 3

The stage plan for **initiating a project** is created during the **starting up a project** process

Subsequent **stage plans** are prepared near the **end** of the **current stage** during the **managing a stage boundary** process

This approach allows a **stage plan** to:

be produced close to the time when the planned activities will occur

exist for a much shorter duration than the project plan, accommodating the planning horizon

be produced with the knowledge of the performance of earlier stages



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Module 11

Lesson 5

Plans and work packages

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A team plan - 1

The team plan organizes and controls the work of a team when executing a **work package**

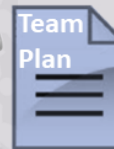
Team plans are optional in **PRINCE2**

A team manager produces a **team plan** to facilitate the execution of one or more work packages

Controlling a stage



Team manager



Managing product delivery

A team plan need is determined by the **size and complexity** of the **project** and the nature of the **resources** involved

A team plan can be helpful when the team is a temporary organization with staff from different parts of an organization

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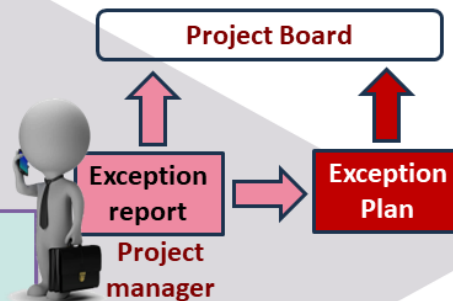
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The exception plan - 1

When a project or stage exceeds (or is anticipated to exceed) an **agreed tolerance**, the **project manager** will raise an **exception report** to the **project board**

An **exception plan** follows an **exception report** and explains how the project will respond to the exception within the stage

If the **project board** decides to address the exception **within** the stage, the **project management team** will prepare an **exception plan** that covers how directed actions will be performed



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The exception plan - 2

Subject to the magnitude of the **exception plan's** impact, it may be limited to **remediation actions** such as more frequent inspections in response to a quality exception

If resolving the exception requires actions **beyond the scope of the current stage**, those actions must be addressed through a change to the **project plan**

If the **exception** would cause **project-level tolerances** to be exceeded, the exception will need to be **escalated to the business level** for a decision

Exception plans are not required for **team plans** used to manage the delivery of **work packages**



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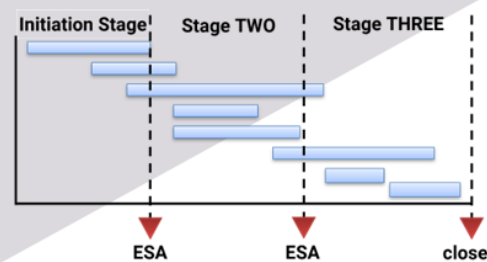
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Stages and work packages - 1

PRINCE2 stages do not overlap, instead, they **partition** the project by introducing **stop-go** decision points

By not overlapping the **project management team** can review progress and assess whether the project has **continued business justification** and therefore should proceed to the **next stage**

The stages also enable the **project management team** to maintain business case alignment through subsequent stage plans and stage boundary decisions

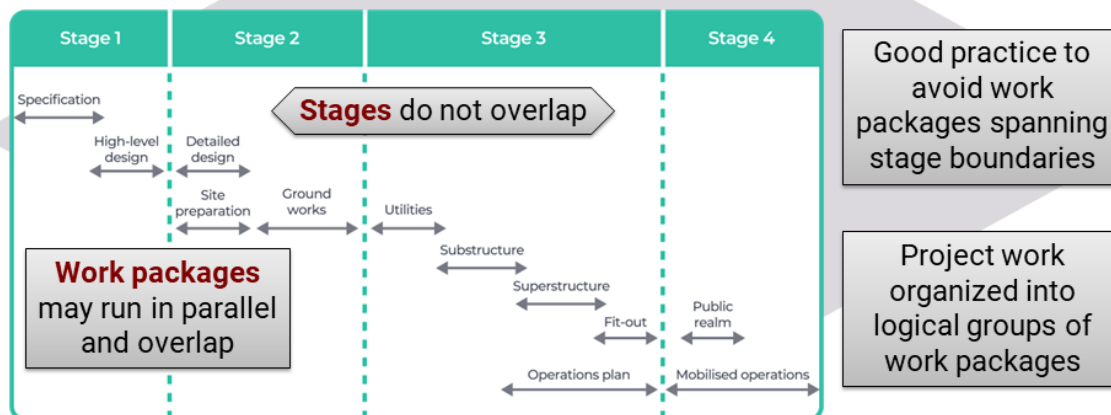


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Stages and work packages - 2

Project work may be organized into logical groups of work packages, depending on the delivery method being used, the set of specialist skills required, or the relationships of the organizations involved



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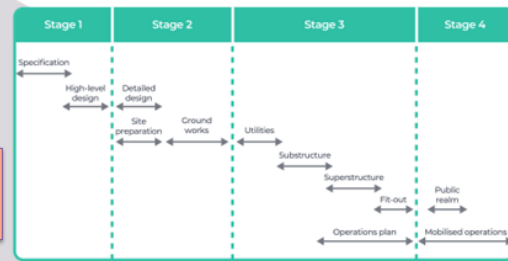
Stages and work packages - 3

Such logical groupings of activity may run in parallel and overlap

It is good practice to **avoid** having **work packages** span a stage boundary ...

... as stage boundary decisions could lead to **repeated work or waste** relating to work in progress

Where work packages span a stage boundary, such as work packages involving procurement of long lead items, their **status will need to be reviewed** as part of the **managing a stage boundary process**



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Module 11

Lesson 6

Tolerances in planning

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Tolerances in planning - 1

Many projects are driven by various **constraints**, such as schedules and resources

For example, a project that must be completed by a **certain date** would be considered a **schedule-driven project**

On the other hand, a project that must be delivered without any **resources** beyond those authorized in the project initiation documentation would be considered a **resource-driven project**

A crucial element of effective planning is understanding **which constraints take precedence**, to select which **approaches** to use, and the **appropriate tolerances for control**



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Tolerances in planning - 2

PRINCE2 includes tolerances for **benefits, time, cost, quality, scope, risks**, and **sustainability** to manage such constraints at **each level of the plan**

The **PRINCE2 technique for planning** helps the **project management team** to set **tolerances** that balance the need for the **project board to maintain effective control**

At the same time, it enables **the project manager or team manager** to achieve **efficient delivery**



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Tolerances in planning - 3

Time tolerance

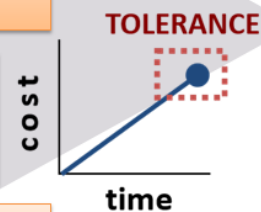
The permissible deviation in a plan's time that is allowed before the deviation needs to be escalated to the next level of management

The plan for a **schedule-driven project** will have a narrow time tolerance, possibly set to zero, indicating that any delays would put the project at risk of failure

Cost tolerance

The permissible deviation in a plan's cost that is allowed before it needs to be escalated to the next level of management

The plan for a project that must be delivered within a **fixed budget** will have a narrow cost tolerance, possibly set to zero, indicating that there is no room for an increase in cost



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Tolerances in planning - 4

Scope tolerance

The permissible deviation in a plan's scope that is allowed before it needs to be escalated to the next level of management

A **project plan** delivering a product that is new to an organization might specify some level of **tolerance** for initial support and user training after acceptance

This ensures a **smooth transition** to the new business as usual

How wide or narrow each **tolerance** is set for each **level** of plan, improves the understanding of which **constraints** take precedence and how they should be incorporated into a plan



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Product-based planning technique

This was covered in **Module 10**, and forms part of the **Plans Practice**

Planning horizon
Levels of plans
Project plan
Stage plan
Team plan
Exception plan
Stages and work packages
Tolerances in planning
Product-based planning technique
Preparing estimates
Preparing a schedule
Preparing the budget

Analysing risks
Documenting the plan
Supporting techniques
Organizational context
Commercial context
Delivery method
Sustainability
Scale
Management products
Practice key roles
Relationships with principles

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Module 11

Lesson 7

Completing the plan

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Preparing estimates - 1

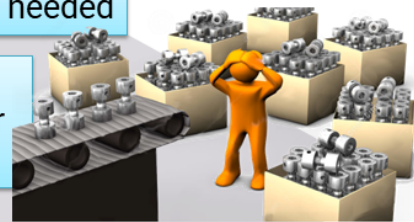
Project managers and team managers plan using estimates of:

people: these can be the specific skills required, the level of effort involved, and when and where they will be needed

resources: these can be specific materials, equipment, facilities, access, natural resources, or money, as well as the number or amount of each

duration of activities: preparation of the schedule requires estimating the time it is likely to take to complete tasks

cost of people and resources: for people, these can be labour rates, fees, or salaries, whereas for resources such as materials, these can be unit costs and based on market rates or supplier contracts



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Preparing estimates - 2

Project managers and team managers plan using estimates of:

benefits: these can be estimates of the value of the outcomes enabled by the project products

risk: these can be estimates of the proximity, probability, velocity, and the impact of risks and their associated risk responses

It is useful to include a **level of confidence** with every estimate

The higher the level of **confidence** in an estimate, the less likely that unexpected variations will be encountered during delivery

This enables the **project manager** and **project board** to agree to a realistic set of **tolerances**



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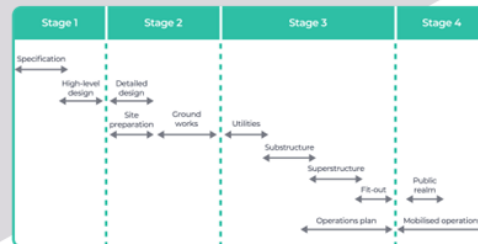
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Preparing a schedule

A **schedule** is a graphical representation of a plan (such as a **Gantt chart**), typically describing a sequence of tasks together with resource allocations, which collectively deliver the plan

The sequencing, interrelationships, and duration of **work packages** and their associated **tasks** are captured in a schedule

All **work packages** for a stage must be included in the **schedule** for the stage



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Preparing the budget - 1

The **people and resource requirements** can be listed, and their costs along with other costs can be calculated to produce the plan's **budget**

The budget should include:

cost of the activities (including people, equipment, materials, and facilities) to produce and deliver the products and the **project management activity cost**

risk budget

change budget

cost tolerances

A **resource** is defined as the goods, services, equipment, materials, facilities, and funding required to complete a plan



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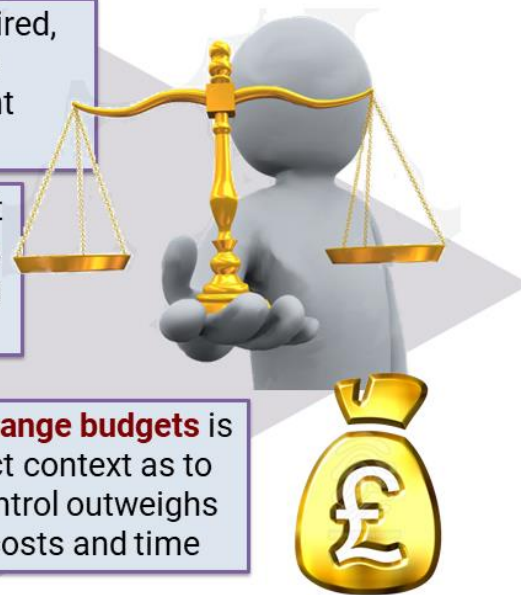
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Preparing the budget - 2

Subject to the **type of resources** required, the plan's budget may need to be documented using several different components

For example, the **time** required in a test facility may be indicated in a **schedule**, whereas the necessary **capital funding** may be detailed in the **project budget**

The use of distinct **risk budgets** and **change budgets** is optional and will depend on the project context as to whether the value of the additional control outweighs the additional project management costs and time



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Analysing risks

Plans need to be **analysed for risks** throughout the planning technique, and as the plan details develop and evolve it should be examined for its **potential risk content**

All identified **risks** should be entered into the **project log: risk register**

After production, the **plan** should still be considered as a draft until decisions regarding whether and how to treat the **inherent risks** in the plan have been made

Subject to those decisions, **the plan** may need to be **modified** due to **new risk situations**



Project log

- Issue register
- Risk register
- Lessons log
- Product register
- Quality register
- Daily log

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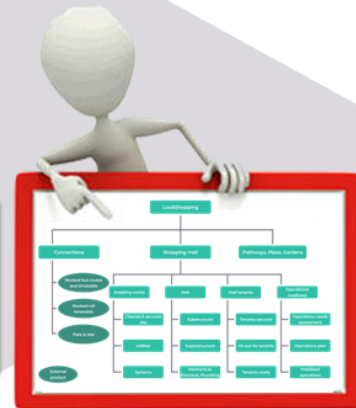
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Documenting the plan - 1

The **PRINCE2 planning technique** creates several **management products** that constitute the plan

The schedule and budget may be maintained in separate systems or files

Meanwhile, the **product breakdown structure**, **product flow diagram**, and **work breakdown structure** may be maintained in a document, spreadsheet, or graphical planning tool



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Documenting the plan - 2

Multiple plan elements may be maintained in a **team collaboration tool**

Even so, it is often useful to prepare a narrative document that explains the plan at a high level and identifies:

internal and external dependencies

monitoring and control requirements

proposed tolerances

key risks

budgets

assumptions underlying any of the above



A **project plan** would also include a description of the **stages** and **planned project board decisions**

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Module 11

Lesson 8

Supporting techniques

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Supporting technique - prioritizing

Projects seldom have the money, time, or resources to **deliver everything** wanted by the organization, users, or suppliers, even if delivery of everything has business justification



M
S
C

Must have
Should have
Could have
Won't have

W



This means that on most projects, scope (including acceptance criteria and quality specifications) must be **prioritized** whereby the project will attempt to deliver as much as possible and for which there is a business justification

There are numerous ways to facilitate agreements on priorities over requirements:

Categorizing criteria as **Must-have**, **Should-have**, **Could-have**, or **Won't have**

PRIORITIES

- 1.
- 2.
- 3.



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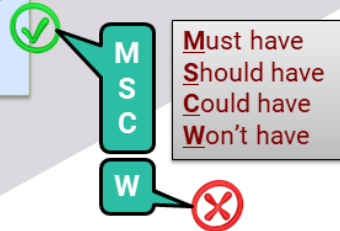
Supporting technique - prioritizing

Must have: critical requirements that are essential for the project's success, these requirements are **mandatory** and must be included in the project scope

Should have: important necessary requirements for the project's success but can be **delayed** if necessary. Not critical, and can be deferred to a **later project phase**

Could have: desirable requirements not essential for project success but enhances project value. Optional and included **if time and budget allow**

Won't have: not needed for the project's success and **not included** in the project scope



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Supporting technique - prioritizing

The MoSCoW method helps project managers prioritize requirements based on their **importance and urgency**

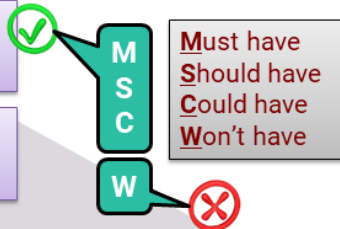
It allows managers to focus on the critical requirements and **allocate resources and budget** accordingly

M
Non-negotiable
minimum viable product
End-product undeliverable without it
Possibly illegal/unsafe without it
Project not viable without it

S
Important but not vital
Painful to leave out but
solution still viable
May need some workaround

W
Won't have currently
Out of budget
Nice to have but little impact

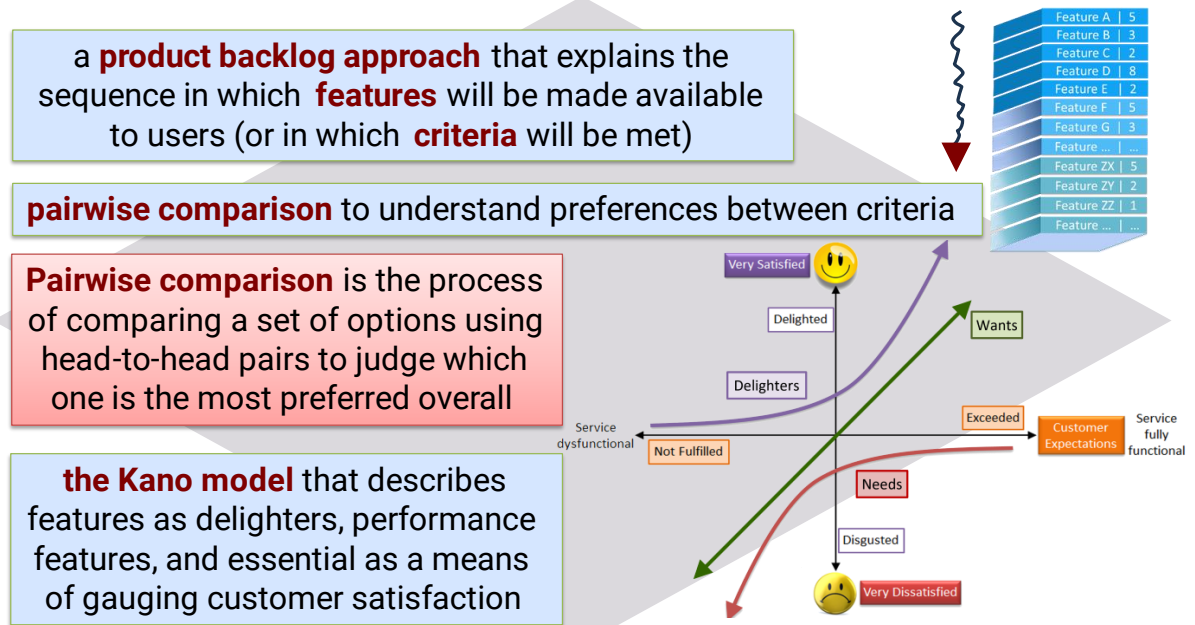
C
Desirable but not as
important as should have
Only do if there is extra time
and budget



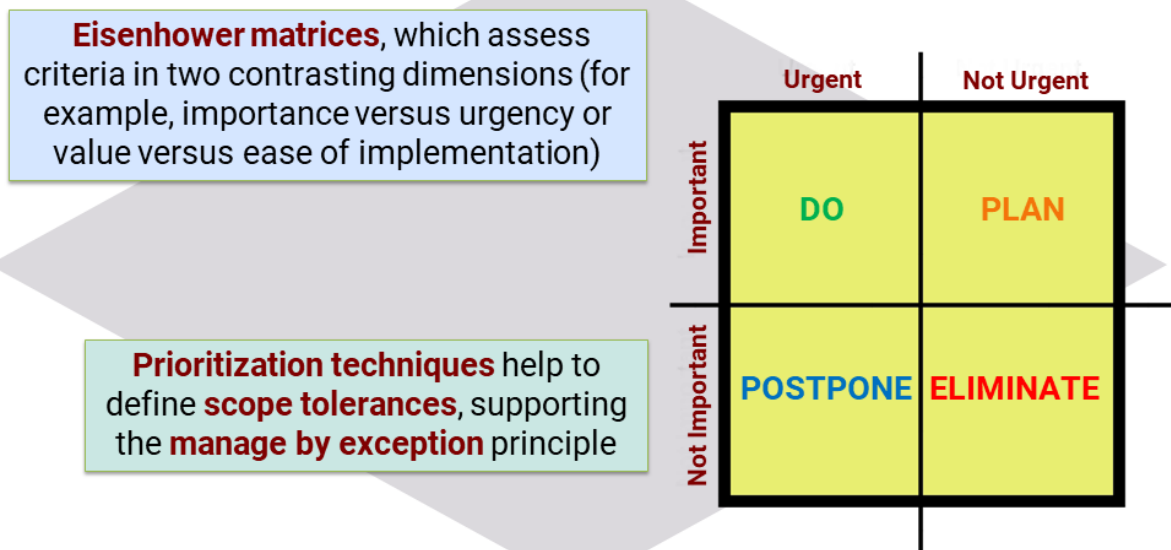
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Supporting technique - prioritizing

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Supporting technique - prioritizing



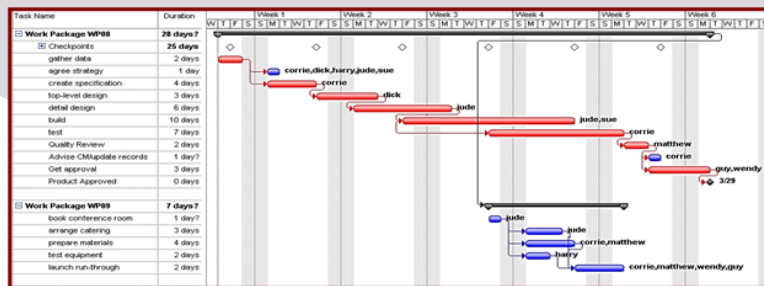
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Project scheduling - 1

Schedules provide information on the sequencing, dependencies, and durations of activities, along with milestones

There are many scheduling and presentation techniques, including the following:

Gantt chart: it is a graphical representation of the duration of tasks and milestones against the progression of time, and are compatible with many scheduling tools



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Project scheduling - 2

Spreadsheet: for simple projects, work packages and tasks can be listed with their corresponding timelines

Can be difficult to maintain for large projects or projects with frequent schedule changes

Topic / Task	Start	Done	September								October							
			6th-12th	13th-19th	20th-26th	27th-3rd	4th	5th	6th	7th	8th	9th-15th	16th-22nd	23rd-29th	30th-6th	7th-13th	14th-20th	21st-27th
Lecture Series - 1	1	1																
Lecture Series - 2	2	2																
Lecture Series - 3	3	3																
Prepare Learning Contract	4	4																
Sign Contract	5	5																

Product checklist: A list of the plan major products and key delivery dates. The planned and actual delivery dates summarizes project delivery performance

ID	Product Title	Product Description approved		Draft Ready		Final Quality Check OK		Product Approved		Handed over	
		Plan	Actual	Plan	Actual	Plan	Actual	Plan	Actual	Plan	Actual
13	Test Plan	06/06	06/06	30/06	02/07	05/07	06/07	10/07	12/07	N/A	N/A
17	Widget1	22/06	20/06	01/07	29/06	12/07		15/07		27/07	
23	Widget2	01/07									
Et c...											

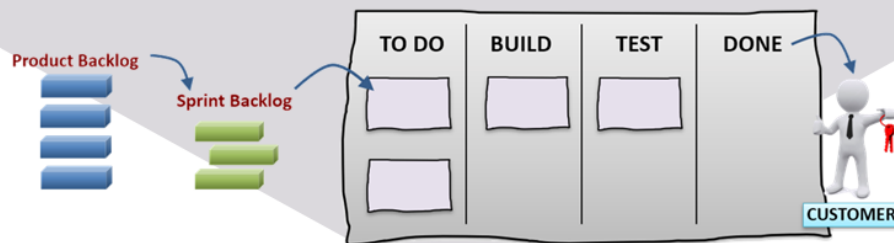
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Project scheduling - 3

Activity flow board: Shows how each product or product component progresses through the work of development or delivery

Used in **Kanban boards** as well as other tools that are often used in **iterative-incremental** projects



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Critical path and critical chain - 1

The schedule should identify the amount of time that an activity can be delayed **without** affecting the **plan completion time** known as **float** or **slack**

A schedule with **zero float** across all activities represents a high risk of delay and exception to the time tolerance:



A critical path diagram illustrates the sequence of activities from project start to finish that have the **least** amount of **total float**

Any delay beyond the planned float between any two activities on the **critical path** means the project will deliver late



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Critical path and critical chain - 2

A weakness in the **critical path diagram** is that it does not address **resource limitations**, so it may be useful to identify the critical chain as well

The critical chain is the sequence of tasks that, given **available resources**, prevents a project from being completed in a shorter time

For example, in a house build, the critical chain might reflect the fact that local regulations prohibit outside construction work on weekends

By identifying task or resource schedule constraints, the project manager can focus on schedule changes of activities, critical paths, or critical chain **as potential exceptions** ...

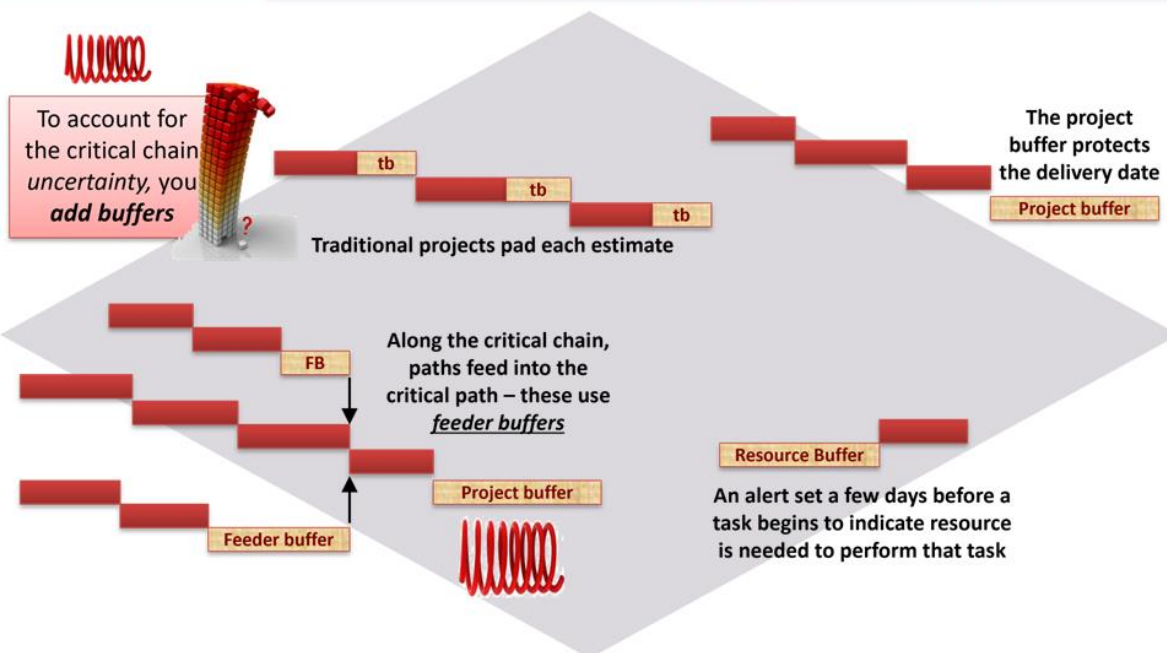
... and can **avoid exceptions** by adjusting activity timing with available **float** or **resource** flexibilities



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Critical Chain method



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Module 11

Lesson 9

Estimating techniques PART ONE

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Top-down estimating - 1

top-down: a top-down technique assumes that the costs, duration, and level of effort of the major products and work packages can be estimated to a high level of confidence ...

... these are then allocated to subordinate elements of the **product breakdown structure** and **work breakdown structure**

This technique could be used for an **iterative-incremental** project in which delivery is structured into **stages** and **sprints** with fixed timeframes and resources



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Top-down estimating - 2

"Estimating by experience"

Scaled from **similar projects** according to size, complexity, and technology

...taking requirements or design and comparing with similar completed projects where the effort or cost is known...

Uses historic data from similar projects to determine cost and time estimates

By comparing the **work effort** needed within the stages of previous similar projects, a **similar ratio** can be used for this project



Be careful of "Padding"

- Is it bigger or smaller?
- More, or less complex?
- Design methods different?
- Technology the same?

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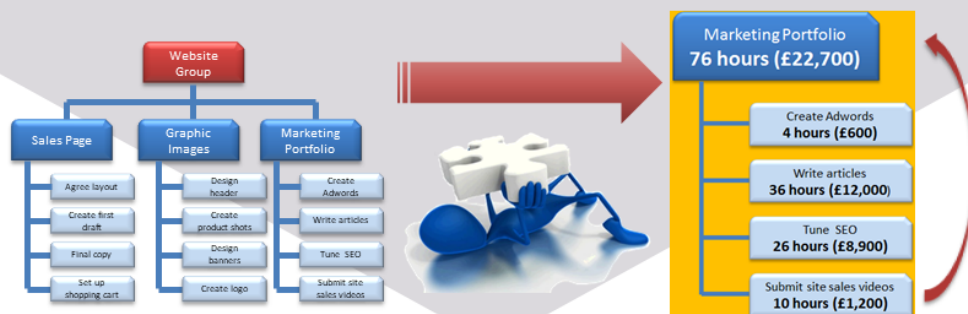
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Bottom up estimating

bottom-up: a bottom-up technique develops estimates for individual products, components, activities, or tasks at their lowest level of definition

The lower-level estimates are then **aggregated** to obtain overall estimates

Useful with well-understood lower-level elements but combined in a unique way to the project/organization



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Comparative estimating

Comparative/analogous: when the materials, products, or delivery work are **well-understood** and based on common practices, estimates can be developed based on similar projects or openly available market information



Uses estimates from your own **similar past projects**



Useful when only **limited information** is known or when historical data from similar projects is available

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Parametric estimating - 1

parametric: when **measured** or when **empirical data** on materials, effort, and duration is available and supported by estimating models (such as in the construction industry), estimates can be developed using values from the project, such as the number, units, or size of a structure

This uses statistical methods and publicly available data to calculate project cost estimates

Is suitable for comparing **similar projects** or activities that can be scaled

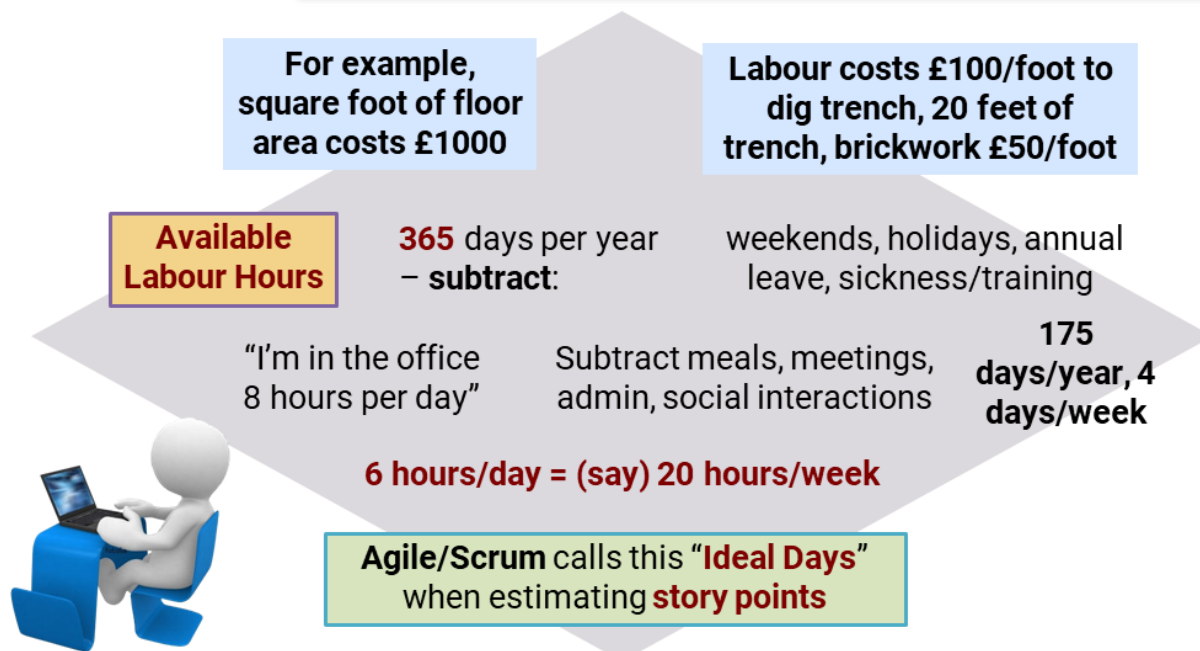
“If it takes an engineer 3 hours to install an application, then it will take 5 engineers to install the same application 5 times within 3 hours, or just one engineer 15 hours”



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Parametric estimating - 2



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Estimating techniques PART TWO

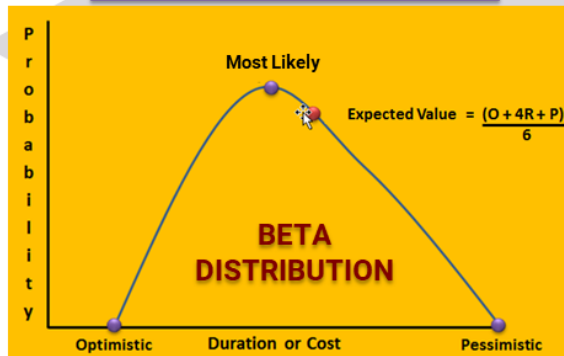
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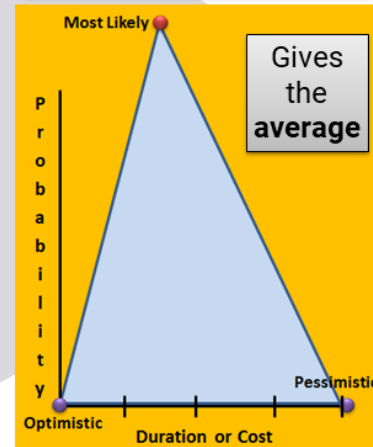
Three-point estimating

- Most-Likely** From experience
- Best Case** No snags/delays/rework
- Worst Case** Snags/delays/rework

$$E = \frac{BC + (4 \text{ times } MLC) + WC}{6}$$

**TRIANGULAR DISTRIBUTION**

$$\text{Expected Value } \frac{(O + R + P)}{3}$$



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Data analytics

data analytics: descriptive analytics (understanding the characteristics of a task) and **predictive analytics** (understanding a task's predisposition to specific outcomes) can be used to help improve estimates

This requires access to data that may be generated by the project, held by the business layer, or sourced from a data trust



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Subject matter experts - 1

Consensus-based techniques, such as **Delphi and planning poker**, can be used to develop a consensus on estimates with the participation of **subject matter experts**

The Delphi method consists of several rounds of written questionnaires that allow experts to give their opinions

1

After the experts answer each round of questionnaires, the facilitator collects all the answers and hands out a summary report of the answers to each expert



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Subject matter experts - 2

2

The experts review the summary report and either agree or disagree with the other experts' answers

3

The experts then fill out another questionnaire that gives them the opportunity to provide updated opinions based on what they understand from the summary report

The Delphi method becomes complete when a **consensus** of forecasts is achieved



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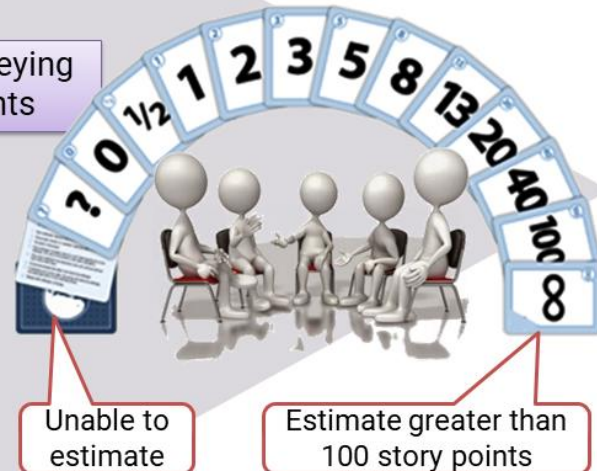
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Planning Poker - Agile

A group uses specially numbered playing cards to vote for an estimate of an item – voting then repeats with discussion until all votes are unanimous

Based on **Fibonacci sequence** conveying an estimate in terms of story points

Non-linear range of values are used because more complex tasks have far more variables than a simple well understood task



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Module 11

Lesson 11

Context and delivery methods

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Organizational context for plans - 1

Project planning is often influenced by organizational context, including policies, procedures, and support

For example, the **project budget** may be prepared according to handling capital investment expenditure procedures

Projects in governmental/public organizations may need to comply with **regulatory requirements** and ensure record keeping transparency

For projects within a programme, the programme management team may take a major supporting role or even lead the planning for its projects

The programme may have **dedicated planners** that can provide templates for management products and **assist the project manager** in preparing and maintaining the project and stage plans



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Organizational context for plans - 2

The number and length of **stages** will be influenced by the **programme plan**

It may be desirable or necessary to align stage reviews to programme milestones, for example, at the end of a tranche

The programme may even define a set of **standard stages** with which all projects within the programme comply

The programme delivery plan will detail which of the project products are being used by other projects within the programme, and such dependencies to or from the project should be incorporated into the project's plans



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Commercial context for plans - 1

The role of **suppliers** is an important consideration, as many projects rely on external suppliers to deliver **work packages**

This is one reason why it is useful to **align work packages** with their **responsible suppliers**, whether external or internal

However, when an **external supplier** is responsible for a work package, this arrangement may be reflected through a formal agreement such as a **contract**

It is recommended to ensure that the **agreement** requires the supplier's plans to provide **clear traceability** to the applicable elements of the **user's project plan**



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Commercial context for plans - 2

The **agreement** should require alignment with the **acceptance criteria and quality specifications** approved by the **project board**

Often referred to as a **back-to-back agreement**

The **agreement** should state how these plans are to be produced and what rights of **inspection and audit** the user has

The **supplier's plan** should have sufficient **activities or milestones** for the **user's project manager** to maintain their plans

Both the user's and supplier's plans may be **confidential** to the other party as they may contain other information, such as dependencies to or from other client projects or subcontractor costs



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Delivery method for plans - 1

For **linear-sequential projects**, most planning effort is applied upfront in the **starting up a project** and **initiating a project** processes, because these projects are characterized by **well-understood products** and **mature delivery activities**

Similar projects help establish the planning horizon and suggests the necessary products, work packages, and stages

Duration, level of effort, and costs can be estimated with a **high level of confidence**

The **project plan** usually does not change unless there is a **project-level exception**

Project plan estimates are refined into **stage and team plans** and **product descriptions** are further detailed in subsequent stages



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Delivery method for plans - 2

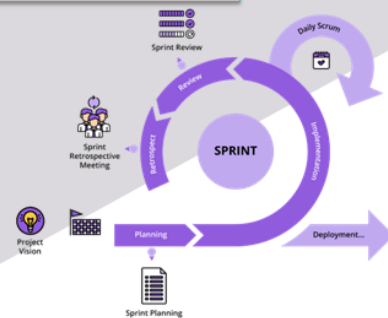
On the other hand, **iterative-incremental projects** focus on how much can be produced over a fixed period (such as a **sprint** or a **timebox**)

This is to deliver an **initial product quickly** and refine and improve it iteratively

When an **iterative-incremental approach** such as **agile** is being used, a common planning approach would consist of:

setting tolerances for each **iteration** that effectively fix time and cost and enable more flexibility in scope

producing the **project product description** in terms of **expected outcomes and benefits**



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Delivery method for plans - 3

developing the user stories, epics, and product backlogs

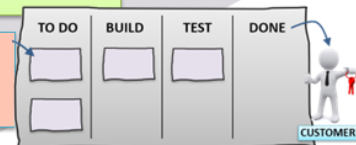
instead of **product descriptions** determining the length of releases or timeboxes and defining these as stages - estimating the resource requirements for each stage and preparing the **project budget**

combining the **product backlog** and workflow in a collaborative planning tool, such as a **Kanban board**

A **Kanban board** may be used instead of a **team plan** and is developed as a joint effort by the **whole development team**

The iterative-incremental approach lends itself to the review and update of the plan as part of each cycle ...

... this is just as in the preparation of **stage plans** in a linear project; however, it reflects the updates in a **collaborative planning tool**



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Module 11

Lesson 12

Sustainability and Scale

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Sustainability with plans - 1

Plans can address **sustainability** in at least **three** different ways:

product sustainability: in identifying and describing the required products, it is useful to determine the environmental impact of the product through its full lifecycle, including disposal where appropriate

delivery sustainability: projects often face choices in planning work packages and stages that can affect the climate impacts of the delivery activities



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Sustainability with plans - 2

Plans can address **sustainability** in at least **three** different ways:

delivery sustainability: Agreeing to **sustainability tolerances** is an effective way in which the project manager and project board can keep things like fuel consumption and production wastes aligned with the **organizational strategy**

benefits sustainability: projects often deliver benefits long after they have been closed, and some projects fail to achieve the expected benefits because there are only **limited means** to **sustain these benefits**

i.e. ongoing training and user support are not considered when defining the project's scope

This problem could be avoided by identifying **requirements** to ensure **benefits sustainability**



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Planning Scale - 1

The **PRINCE2 planning technique** supports a wide range of projects, and although this always applies, the level of planning effort can be easily scaled up or down based on the project characteristics and needs

Aspects of **project scale** that affect planning include:

duration: Project plans are likely to adapt to changes (both the external environment and internal project delivery activities) for long project lifecycles

Duration should be considered in organizing work packages and stages, as well as in estimating the **change budget**

Multi-year projects will likely see project team changes, and key roles such as the project manager

Project plans should be prepared to aid orientation, continuity, and reduce the impact of turnover

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Planning Scale - 2

size of the project team: large and dispersed project teams will generally need **more project support** and benefit from easily accessible project planning and reporting tools and documentation

complexity: projects with a small number of products and work packages can be planned with **relatively simple** documents and tools

For example, the **project schedule** could be a **list of major milestones** or a presentation slide

As the number of **products** and **work packages** increase, use of specialized tools (i.e. a project scheduling application) makes it easier to analyse and **incorporate changes**



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Planning Scale - 3

novelty: if the products or delivery method are new to an organization, it may be difficult to rely on experience or similar projects to capture requirements or estimate schedule and costs

Such plans have high uncertainty and justify the use of **risk mitigating techniques** (such as **prototyping**) or an **iterative-incremental** approach

cost: project planning is a prudent way to reduce the risk of project failure, so it makes sense to ensure that the **level of effort** in project planning is in line with the **overall cost of the project**

Project planning and support cost will depend on the **importance and complexity** of the project. (maybe be ten percent plus of overall project cost)



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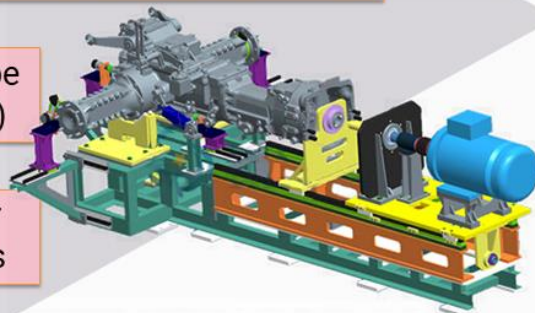
The Plan management product - 1

The plan purpose is to provide a proposal that outlines the what, where, when, how, and by whom the project (or a subset of its activities) will be performed

When approved, a plan provides a **baseline** against which progress can be measured and issues assessed

Scope: description of the plan's scope (project, stage, team, and exception)

Dependencies: external products or activities on which the plan depends



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The Plan management product - 2

Planning assumptions and prerequisites: assumptions on which the plan is based and any fundamental aspects that must be established or remain in place for the plan to succeed

Lessons incorporated: details of relevant lessons from previous similar projects, which have been reviewed and accommodated within this plan

Products to be delivered: the **product breakdown structure**, **product flow diagram**, and **product descriptions** that fall within the **scope** of the plan

Work to be performed: the work in the scope of the plan shown by way of a **work breakdown structure** and the associated **work package description(s)**



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The Plan management product - 3

Budget: the project costs, including the **risk budget** and **change budget**

Schedule: a representation of the **project stages** and activities, their durations, and sequence, such as a **Gantt chart**

Targets and tolerances: the **permissible deviations** for scope, cost, and time at the level of the plan

Stage plans and team plans may also include **sustainability** and **risk tolerances**

Monitoring, control, and reporting arrangements: description of how the project will be monitored and controlled and of reporting procedures and responsibilities



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PRINCE2[®] Seventh Edition Masterclass

Module 11

Lesson 13

Plans practice key roles

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Plans practice Business layer

**Business
(commissioning) layer**

set **project tolerances** and document them in the **project mandate** or confirm them to the **project board** for inclusion in the **project brief**

approve exception plans
when project level
tolerances are forecast
to be exceeded

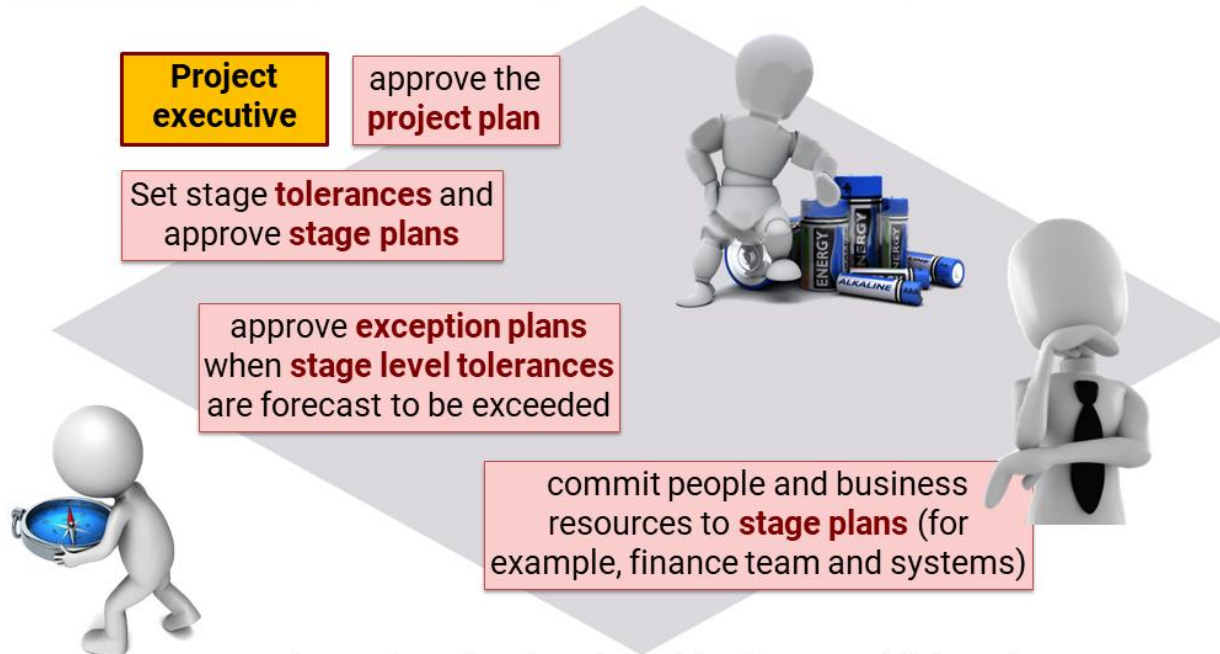
provide the planning standards
required by the business



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Project executive responsibilities



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Senior user responsibilities

Senior user

- advise and assist the **project manager** in preparing **project and stage plans**
- ensure that the **project plan and stage plans** remain consistent with the **user perspective**
- commit people and user resources to stage plans (for example, operational staff for training or testing and test environment)



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Senior supplier responsibilities

Senior supplier

advise and assist the **project manager** in preparing project, stage plans, and work package descriptions

ensure that the project plan and stage plans remain consistent from the supplier perspective

commit people and supplier resources to stage plans (for example, developers and machinery)

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Project manager & team manager responsibilities

Project manager

design the plans

prepare the project plan, stage plans, and work package descriptions and update as necessary

decide how stages and delivery steps are to be applied

instruct corrective action when work package level tolerances are forecast to be exceeded

prepare an **exception plan** in response to the project board's decision on an **exception report**

Team manager

prepare team plans

assist the **project manager** in preparing **work package descriptions**

prepare schedules for each **work package**

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Project assurance responsibilities

Project assurance

review the feasibility of stage and the project plan against agreed targets and their **tolerances**



review changes to the **project plan** to see whether there is any impact on the needs of the **business** or the **project business case**

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Project support responsibilities

Project support

assist with the compilation of the project plan, stage plans, work package descriptions, and team plans

contribute specialist expertise (for example, planning tools)

baseline, store, and distribute the project plan, stage plans, team plans and work package descriptions



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PROJEX ACADEMY

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Module 11

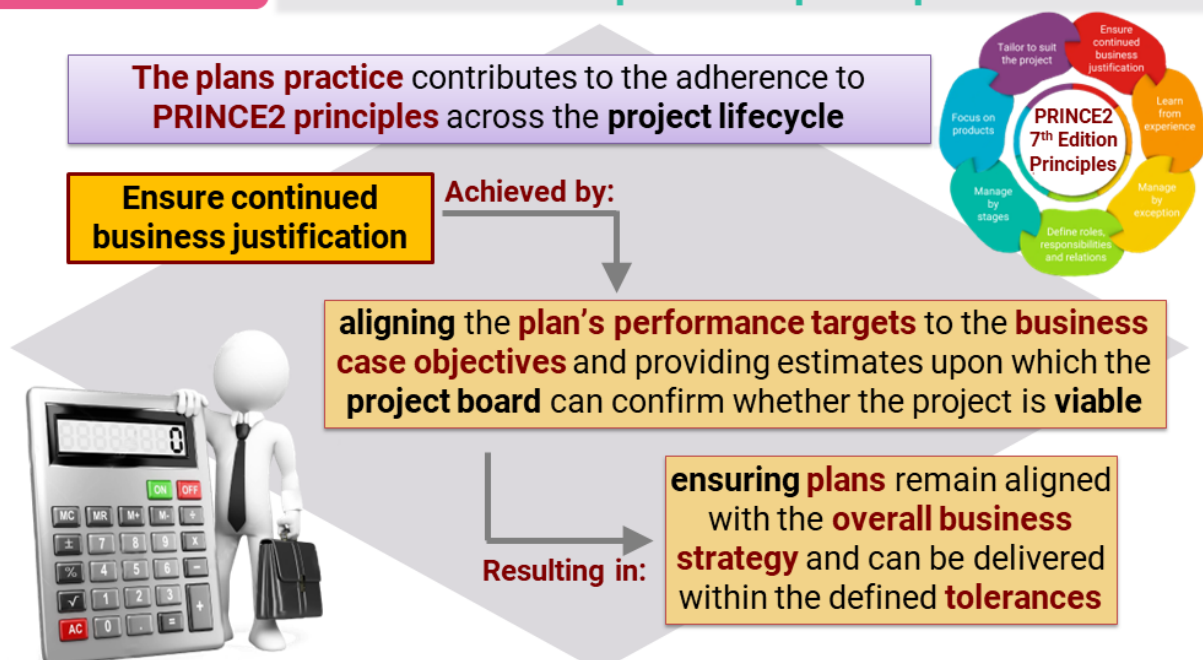
Lesson 14

Plans practice principle relationships

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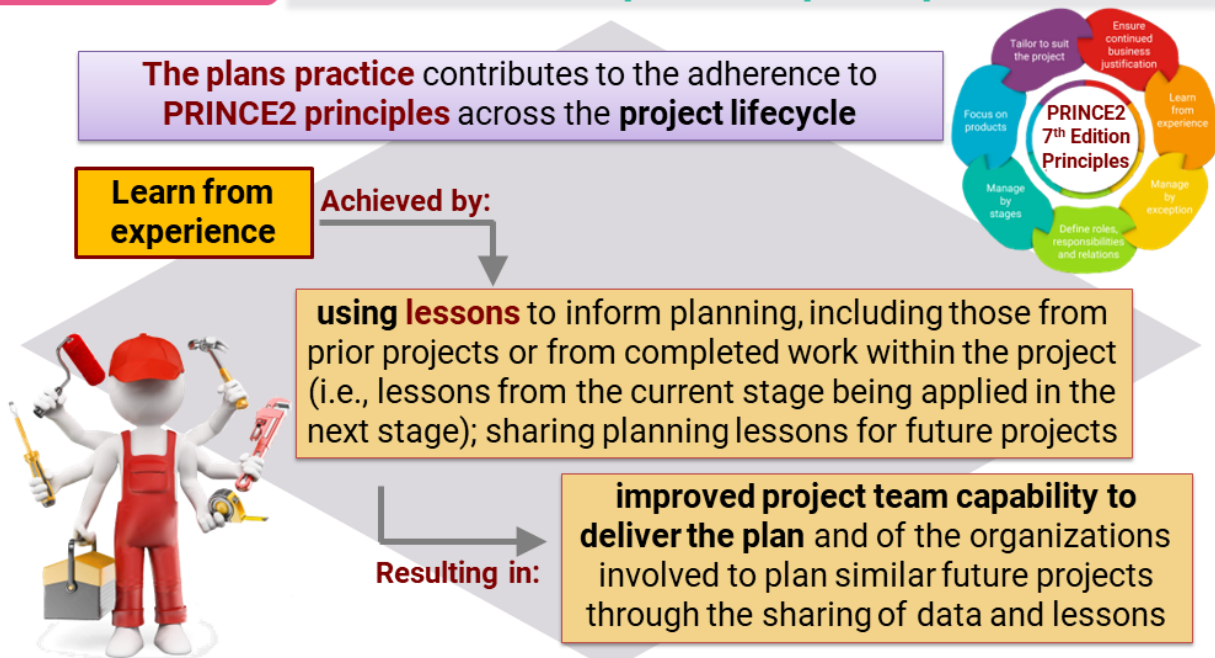
Plans practice principles - 1



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Plans practice principles - 2



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Plans practice principles - 3



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Plans practice principles - 4

The plans practice contributes to the adherence to PRINCE2 principles across the project lifecycle

Manage by stages

Achieved by:

breaking the project lifecycle into stages as a means of **accommodating planning horizons** and aligning stages to key decision points as required

Resulting in:

project stages and tolerances planned in a manner appropriate to both the **business needs** and **realistic estimates** of resources, schedule, risks, and issues



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Plans practice principles - 5

The plans practice contributes to the adherence to PRINCE2 principles across the project lifecycle

Manage by exception

Achieved by:

defining levels of plan (project, stage, and team) and establishing the **targets and tolerances** for them

Resulting in:

efficient decision-making and escalation appropriate to the level of plan (project, stage, or team)



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Plans practice principles - 6

The plans practice contributes to the adherence to PRINCE2 principles across the project lifecycle

Focus on products

Achieved by:

basing all plans and planning activities on identifying the required products and the most effective way to deliver them

Resulting in:

effective communication with stakeholders and avoidance of unnecessary work and products



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Plans practice principles - 7

The plans practice contributes to the adherence to PRINCE2 principles across the project lifecycle

Tailor to suit the project

Achieved by:

requiring only planning activities and plans appropriate to the project approach and context

Resulting in:

the right balance between project management, delivery activities, and resources



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Well Done! on completing Module 11!

PART ONE	PART TWO	PART THREE	PART FOUR	PART FIVE
Module 1 PRINCE2 Overview	Module 4 Starting Up a Project	Module 7 Initiating a Project	Module 10 Product-based Planning	Module 13 Controlling a Stage
Module 2 PRINCE2 Principles	Module 5 Organizing Practice	Module 8 Risk Practice	Module 11 Plans Practice	Module 14 Managing Product Delivery
Module 3 People	Module 6 Business Case Practice	Module 9 Quality Practice	Module 12 Directing a Project	Module 15 Managing a Stage Boundary
PART SIX	Module 16 Issues Practice	Module 17 Progress Practice	Module 18 Closing a Project	

Don't forget to carry out the module workshops!

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Example scenarios

There are example scenarios used throughout the official guide, which demonstrate how the PRINCE2 method can be applied to a wide range of projects.

A short summary of each scenario is provided below. Some of the scenarios feature projects at an early stage in their development, whereas others are partway through the project lifecycle. The following icons represent each of the scenarios that appear throughout the guide.



Scenario: illustrating a sensible planning horizon

As a complex infrastructure project where the work is performed consecutively and multiple dependencies must be managed, it is fundamental that appropriate planning is available for the implementation of the LouisShopping project.

However, the project spans three financial years and is just starting the design stage.

Hence, it would not be realistic to attempt the development of a detailed plan to show what each team member is doing for the next two years, as it will likely become inaccurate within a short time span.

Therefore, a sensible and effective approach to project planning would be to combine planning horizons and levels of detail. This would be achieved by producing an outline plan for the next two years remaining in the project (long-term) while building a detailed plan for the current design stage (short-term).

Additionally, as a commercial firm is to be selected through a tendering exercise, the stage plans for construction stages will require collaboration between the Louistown city council and the supplier. This will only be finalized following the contract award.

Scenario: scope uncertainty and short planning horizon

Due to high uncertainty of the scope of the Findef project and the iterative-incremental approach for the development of each product, the project manager suggested that the duration of the individual stages of the project would not exceed 1 month.

At the end of each stage, the project manager and the project board will have an opportunity to redefine the scope, plan the next stage in detail, and if needed, redirect the project to achieve as much value out of the products and requirements delivered as possible.

Also, each stage after initiation and design stages (1-3) will deliver a ready-to-use increment of the project product.

Scenario: use of specialist involvement in stage plan creation

Findef's lack of experience working with end users rather than through banks and merchants make the new product development project risky.

To mitigate this risk, a marketing agency that are specialists in market research, branding, and development have been contracted by Findef to assist in the design and early market testing of each new product, providing close monitoring from conception to launch.

To ensure that the estimates and timescales are realistic and that common risks are considered, based on previous similar projects, each stage plan is developed with the involvement of specialists from the marketing agency.

Scenario: tolerances changing from stage to stage

As project delivery progresses, more certainty about estimates is gained. Accordingly, the tolerances agreed for each stage of the project should reflect that progression.

In the initiation stage, when the LouisShopping project started, the project board agreed to a tolerance of +/- 40 percent for the initial estimates of time and cost presented to be refined following the development of the project plan by BuildyBrick.

Now that the initiation stage has been completed and the knowledge gained from this stage returned to the project, the project board has applied a +/- 20 percent tolerance range to the starting design stage.

Scenario: example of complying with regulations

Findef's change of business model means they are selling directly to consumers rather than via intermediaries such as the banks. This means they are now subject to consumer protection regulations that had previously been the responsibility of their intermediary.

The Findef Two programme commissioned a study to determine what changes they would need to make across the business to comply with consumer protection regulations and any other regulations.

The study revealed that the regulations also had requirements of product design. The requirements were fed into the product descriptions. The project team included additional reviews in the stage plans (stages 3, 4, and 5) to verify compliance with them.



Scenario: procurement/tender in separate stages

The three innovative cybersecurity products to be delivered by Findef required tender activities throughout the project to secure advisory, marketing specialists, and training delivery.

As a hybrid approach of linear-sequential is being used for the overarching design and an iterative-incremental approach is being applied to the development of each product, procurement of services was fully completed in stage 2.

This included extensive work from Findef to issue a request for proposals followed by rounds of presentations by shortlisted suppliers.

After a detailed assessment of proposals by each candidate against the weighted criteria and assurance from the procurement team, a contract has been awarded to the current marketing agency and training provider.



Scenario: timebox delivery method

Data Knowledge is using a timebox delivery method to ensure that the new time-reporting solution and reporting suite can be deployed quickly to several new projects and enhanced during its roll-out to the rest of the business.

With fixed budget and timescale (three months), the project management team has divided the project into small units of time of two weeks each. Based on an agreed product backlog, the team is going to plan and manage how much scope fits in the timebox.

When that period of time is completed, the performance of the timebox is assessed, the backlog is refined, and the subsequent timebox is planned. This approach ensures continuous and incremental delivery by Data Knowledge, enabling value to be perceived early in the project.

Scenario: contrasting scale

Projects are contextual with different scales of size, risk, and complexity. The planning should reflect these differences in an attempt to apply proportionality in the approach.

The LouisShopping project is a typical project (to the supplier) of medium complexity (to the client) and spans three financial years. Therefore, with a larger planning horizon, the project will require a combination of high-level detail (overall project) and low-level detail (stage) when planning.

This is to enable sufficient oversight on a day-to-day basis for team leaders and the project management team while assuring the project board that the overall project is on track.

In contrast, a simpler project with lower complexity and risk that spans six months within the same financial year will be less demanding regarding planning and controls.

This can be seen in the new campaign by NowByou. In this instance, it could be sufficient to present a single timeframe (project plan) relating to the entire project.

PRINCE2 7th Edition Module 6 Exercises



The objective of these exercises is **NOT** to replicate exam questions, but rather to test how much you have absorbed from the PRINCE2 7th Edition syllabus information within the video lessons.

I strongly recommend that you watch each video at least once, and you may find it helpful to skim over video sections for clarification.

I have deliberately not provided answers as I want to encourage you to go back over any video sections that you need to review to obtain the answer. I have included in this handbook graphics of each presentation slide used for each video, and you may prefer to use those instead of the videos.

Finding topic areas, you need to review is a powerful way of honing your PRINCE2 knowledge and gaining a pass in your exams.

1. The definition of a plan is “A proposal that”
2. Plans integrate THREE perspectives – what are they?
3. Complete the sentence: “Plans provide the _____ of the information required to manage a project, and an approved plan provides a _____ against which progress can be measured and issues assessed
4. Describe scope creep in your own words and explain some reasons why and how it can occur
5. Describe planning horizon in your own words and explain how it can be used/applied
6. What is a typical difference between project and stage plans
7. Describe what a team plan is, how it is used (and by whom), and why it is optional
8. What are the three levels of plans, and explain which of those an exception plan belongs to

9. How might plans and work packages change in their use for an iterative-incremental project?
10. Determining how to **divide the project into stages** is a matter of balancing which SIX elements?
11. When considering the number of stages within a project, what are the typical trade-offs to consider?
12. What factors are considered when assessing the length of a specific stage?
13. Complete the sentence: The stage plan information should be _____ back to the project plan
14. In which PRINCE2 processes are stages plans created?
15. Explain the steps leading to creation of an exception plan
16. Explain and contrast how work is structured at project level, stage level, and work packages level
17. Why is it good practice to avoid having work packages span a stage boundary?
18. Regarding planning, explain how time, cost and scope tolerances are applied
19. Project managers and team managers consider which SIX aspects when estimating
20. The project budget should include which SIX aspects?
21. Why must projects use prioritization, and what technique can be used?
22. Explain how pairwise is used in prioritizing
23. Explain how the kano model is used in prioritizing
24. Explain how the Eisenhower matrix is used in prioritizing

25. Which FOUR scheduling tools/techniques are used when project scheduling, and what are the trade-offs for each?
26. Compare and contrast the critical path and critical chain techniques
27. What is top-down estimating and how is it used?
28. What is bottom-up estimating and how is it used?
29. What is comparative estimating and how is it used?
30. What is parametric estimating and how is it used?
31. What is three-point estimating and how is it used?
32. What is data analytics and how is it used in estimating?
33. Consensus-based techniques, such as Delphi and planning poker, can be used to develop a consensus on estimates with the participation of subject matter experts. Describe how both are used and why?
34. Project planning is often influenced by organizational context. Give examples.
35. Explain how the commercial context will influence project planning. Give examples.
36. The delivery method will differ for linear-sequential projects and iterative-incremental projects. Give examples of such differences
37. Plans can address sustainability in at least three different ways, product, delivery, and benefits. Explain the factors to consider for each.
38. The aspects of project scale that affect planning include duration, project team size, novelty, and cost. Explain the factors affecting each.
39. There are EIGHT sections within a typical PRINCE2 plan. Name as many as you can!

40. Regarding planning, can you describe responsibilities the project management team roles?

-----“-----

FOUNDATION QUESTIONS

1. What is the purpose of the plans practice?

A. To enable the project manager to control the project by defining who will deliver the products, and when to deliver them

B. To enable the project executive to monitor whether the project is desirable, viable and achievable and should continue

C. To allow the project executive to define which role in the project management team is responsible for producing the plan

D. To allow the project manager to plan how to respond to uncertainties and who should action the agreed responses

2. The business strategy has changed, requiring the scope of the project to be increased beyond the tolerances that have been agreed by the business layer.

Which plan should be produced to include this change?

A. Project plan

B. Stage plan

C. Team plan

D. Exception plan

3. Identify the missing word in the following sentence:

When planning, there are at least two types of [?] relevant to a project: internal and external.

A. dependency

B. plan

C. exception

D. scope

4. How should the project plan typically accommodate an iterative incremental project?

A. By having multiple delivery stages that allow acceptance criteria to be refined as the products are delivered

B. By ensuring that product descriptions are complete before the project is approved by the project board

C. By breaking down the work of the stage to the level of detail required for day-to-day control by the project manager

D. By dividing the project into two stages to enable iterative delivery of products during the project

5. The project manager needs to capture the user's quality expectations. In which step of the planning technique should the expectations be captured?

A. Defining and analysing the products

B. Organizing work packages

C. Preparing estimates

D. Preparing a schedule

6. How should approved plans enable control?

A. Plans should provide the baseline from which the schedule can be developed

B. Plans should be used to monitor progress and assess the impact of issues and risks

C. Plans should be updated as soon as a change in the project scope is identified to show the revised scope

D. Plans for the project as a whole include estimates that are the most accurate

7. The team manager needs to check what products should be delivered by his team.

Which management product should the team manager review?

- A. Project product description
- B. Work package description
- C. Stage plan
- D. Project plan

8. What is defined as a high-level plan showing the major products of the project?

- A. A project plan
- B. A stage plan
- C. A team plan
- D. A work package

9. How should the project manager address the planning horizon?

- A. By preparing a complete and detailed project plan based on accurate estimates
- B. By preparing a stage plan for the next stage based on more accurate estimates
- C. By identifying the major products and activities in the project plan
- D. By identifying interdependencies between major products in the stage plan

10. In which step of the planning technique should the project manager identify the equipment needed to deliver the plan?

- A. Preparing estimates
- B. Defining and analysing the products
- C. Organizing work packages
- D. Preparing a schedule

FOUNDATION ANSWERS

1. What is the purpose of the plans practice?

A. To enable the project manager to control the project by defining who will deliver the products, and when to deliver them

B. To enable the project executive to monitor whether the project is desirable, viable and achievable and should continue

C. To allow the project executive to define which role in the project management team is responsible for producing the plan

D. To allow the project manager to plan how to respond to uncertainties and who should action the agreed responses

A. Correct. "The purpose of the plans practice is to facilitate communication and control by defining the products to be delivered (the 'what') and the means to deliver them (the 'who', the 'how', the 'where', and estimates of the 'when' and for how much) to satisfy the project business case (the 'why').

2. The business strategy has changed, requiring the scope of the project to be increased beyond the tolerances that have been agreed by the business layer.

Which plan should be produced to include this change?

A. Project plan

B. Stage plan

C. Team plan

D. Exception plan

D. Correct. "When a project or stage exceeds (or is anticipated to exceed) an agreed tolerance, a project manager will raise an exception report to the project board. If the project board decides to address the exception within the stage, the project management team will prepare an exception plan that covers how directed actions will be performed.

3. Identify the missing word in the following sentence:

When planning, there are at least two types of [?] relevant to a project: internal and external.

A. dependency

B. plan

C. exception

D. scope

A. Correct. It is dependency. "A dependency means that one product is dependent on another. There are at least two types of dependency relevant to a project: internal and external."

4. How should the project plan typically accommodate an iterative incremental project?

A. By having multiple delivery stages that allow acceptance criteria to be refined as the products are delivered

B. By ensuring that product descriptions are complete before the project is approved by the project board

C. By breaking down the work of the stage to the level of detail required for day-to-day control by the project manager

D. By dividing the project into two stages to enable iterative delivery of products during the project

A. Correct. As part of defining 'the number of stages, "For an iterative-incremental project, the project plan may provide multiple delivery stages in which the quality and acceptance criteria are refined in parallel with development of the required products through the use of a product backlog."

5. The project manager needs to capture the user's quality expectations. In which step of the planning technique should the expectations be captured?

A. Defining and analysing the products

B. Organizing work packages

C. Preparing estimates

D. Preparing a schedule

A. Correct. "In the process of starting up a project, the major products or outcomes, along with key quality requirements, are documented in the project product description." This happens when writing the project product description in the 'defining and analysing products' step.

6. How should approved plans enable control?

A. Plans should provide the baseline from which the schedule can be developed

B. Plans should be used to monitor progress and assess the impact of issues and risks

C. Plans should be updated as soon as a change in the project scope is identified to show the revised scope

D. Plans for the project as a whole include estimates that are the most accurate

B. Correct. "Plans provide the backbone of the information required to manage a project. When approved, a plan provides a baseline against which progress can be measured and issues assessed. Without a plan, there is no point of reference against which scope, benefits, quality, risks, issues, and progress can be monitored and controlled."

7. The team manager needs to check what products should be delivered by his team.

Which management product should the team manager review?

A. Project product description

B. Work package description

C. Stage plan

D. Project plan

B. Correct. A work package description is used "to describe how one or more products will be produced and delivered. It is used to pass responsibility for work formally to a team manager or team member."

8. What is defined as a high-level plan showing the major products of the project?

A. A project plan

B. A stage plan

C. A team plan

D. A work package

A. Correct. A project plan is "a high-level plan showing the major products of the project and when, how, and at what cost they will be delivered."

9. How should the project manager address the planning horizon?

A. By preparing a complete and detailed project plan based on accurate estimates

B. By preparing a stage plan for the next stage based on more accurate estimates

C. By identifying the major products and activities in the project plan

D. By identifying interdependencies between major products in the stage plan

B. Correct. "The PRINCE2 principle of manage by stages addresses the need to keep plans within reasonable planning horizons. For this reason, a PRINCE2 project has: ... a stage plan for the current stage as a detailed document based on more precise estimates that are achievable within the planning horizon."

10. In which step of the planning technique should the project manager identify the equipment needed to deliver the plan?

A. Preparing estimates

B. Defining and analysing the products

C. Organizing work packages

D. Preparing a schedule

A. Correct. "Project managers and team managers always plan using estimates of: Resources - This can be specific materials, equipment, facilities, access, natural resources, or money, as well as the number or amount of each. People - This can be the specific skills required, the level of effort involved, and when and where they will be needed." This is the 'preparing estimates' step.

PRACTITIONER QUESTIONS

Here are three actions related to developing the stage 2 plan.

Which role (A-F) should be responsible for each action?

Choose only **ONE** role for each action. Each role can be used once, more than once, or not at all.

- A. Business layer
- B. Project executive
- C. Senior user
- D. Senior supplier
- E. Project manager
- F. Team manager

1. Check the stage 2 plan to ensure that enough time has been allowed to obtain input and feedback from the User Group on the high-level requirements gathering and options analysis

2. Provide any NowByou standards that exist, based on what was used on previous projects, that could be used when preparing the stage 2 plan

3. Prepare the schedule for the requirements gathering work package for input to the stage 2 plan

4. The project is in stage 1 and the Head of Publicity and Social Media has asked that the project complies with NowByou's procedures for data privacy and confidentiality.

This requirement has been documented in the project initiation documentation. The multichannel campaign is being implemented by an external marketing agency during stage 3.

The team managers implementing the campaign will need to understand this requirement. According to the 'plans' practice, where should the team managers find this information?

- A. Commercial management approach
- B. Project product description
- C. Stage plan
- D. Work package description

5. The project is at the end of stage 2. The project executive has suggested that stage 3 should be divided into two separate stages. The first stage (stage 3a) would implement the chosen campaign option, and the second one (stage 3b) would close the project.

The project executive has instructed the project manager to plan both stage 3a and stage 3b at the end of stage 2 to save time at the end of the next stage.

Is this decision by the project executive an appropriate application of the 'plans' practice, and why?

A. Yes, because the 'closing a project' process should provide a fixed point at which acceptance of the delivered multi-channel campaign should be confirmed

B. Yes, because the work package to implement the chosen campaign option should be in the stage 3a plan, and the work to close the project should be in the new stage 3b plan

C. No, because the activities to complete the 'closing a project' process should be planned at the end of stage 2, not at the end of stage 3a

D. No, because the activities to complete the 'closing a project' process should be planned towards the end of the final stage.

6. The project is in stage 1 and the Contracted Project Manager is preparing the project plan. The Contracted Project Manager has proposed that two stage plans should be produced for the rest of the project one at the end of stage 1 and the other at the end of stage 2.

Is this proposal an appropriate application of the 'plans' practice, and why?

A. Yes, because the project manager should ensure that there is no overlap in the scope of any of the work packages.

B. Yes, because the project manager should prepare a stage plan for the next stage, at the end of the preceding stage.

C. No, because the project manager should include a schedule of activities to close the project in the stage 3 plan.

D. No, because the project manager should have produced the initiation stage plan during the 'starting up a project' process.

Here are three actions related to developing the stage 2 plan.
Which role (A-F) should be responsible for each action?

Choose only **ONE** role for each action. Each role can be used once, more than once, or not at all.

- A. Business layer
- B. Project executive
- C. Senior user
- D. Senior supplier
- E. Project manager
- F. Team manager

7. Check the stage 2 plan to ensure enough time has been allowed to obtain input and feedback from the User Group on the high-level requirements gathering and options analysis

8. Advise the project manager on how to prepare the stage plan to comply with the NowByou requirements

9. Prepare the schedule for the requirements gathering work package for input to the stage 2 plan

10. The Campaign against Discrimination is a critical project for NowByou. As a result, it is important that the project delivers within the agreed project time tolerances.

The Contracted Project Manager has a track record of successful delivery of this type of project. Therefore, it has been decided that the entire project time tolerance should be allocated to stage 3, when the new project manager will be working mostly on their own.

There was an issue with the TV campaign work package during the stage and some extra time is needed to complete the work package. The work will be completed within stage time tolerance.

According to the 'plans' practice, which role should authorize the extra time to complete the TV campaign during stage 3?

- A. Business
- B. Project executive
- C. Project manager

D. Project assurance

11. The Contracted Project Manager is creating the project plan in stage 1 based on a better understanding of the requirements gathering and options analysis work in stage 2. They have also obtained more detailed estimates of time and cost from the external marketing agency implementing the campaign in stage 3.

Is this an appropriate application of the 'plans' practice, and why?

A. Yes, because the project manager should identify the work packages that the external marketing agency will be delivering in stage 3 to implement the campaign

B. Yes, because the project manager should create the project plan to include more detailed cost and time estimates to ensure continued business justification

C. No, because the project manager should create the project plan during the 'initiating a project' process, rather than during stage 1

D. No, because the project manager should include the updated cost and time estimates in the business case to support continued business justification

12. During stage 1, the Contracted Project Manager is preparing the project plan. To do this, the Contracted Project Manager is working with the Director of Campaigns and the Head of Publicity and social media to understand more about the 'options analysis' product, what needs to be produced, who will approve it and the associated quality specifications.

Is this an appropriate application of the 'plans' practice, and why?

A. Yes, because the project manager should produce the product description for the 'options analysis' to be able to estimate realistic time and cost in the project plan

B. Yes because the project manager should define the 'options analysis' product as a major product to be delivered by the project.

C. No because the project manager should describe the 'options analysis' as a major product in the project product description

D. No, because the project manager should create the 'options analysis' product description when planning stage 2 in detail.

PRACTITIONER ANSWERS

Here are three actions related to developing the stage 2 plan.

Which role (A-F) should be responsible for each action?

Choose only **ONE** role for each action. Each role can be used once, more than once, or not at all.

- A. Business layer
- B. Project executive
- C. Senior user
- D. Senior supplier
- E. Project manager
- F. Team manager

1. Check the stage 2 plan to ensure that enough time has been allowed to obtain input and feedback from the User Group on the high-level requirements gathering and options analysis

C. Correct. The senior user should "ensure that project plans and stage plans remain consistent with the user perspective." This should include checking that there is enough time allowed in the plan for User Group input. Ref tab 7.1

2. Provide any NowByou standards that exist, based on what was used on previous projects, that could be used when preparing the stage 2 plan

A. Correct. The business layer should "provide the planning standards required by the business." This should include providing any existing planning standards based on previous projects as the project management maturity of the organization is very low.

3. Prepare the schedule for the requirements gathering work package for input to the stage 2 plan

F. Correct. The team manager should "prepare schedules for each work package." Ref tab 7.1

4. The project is in stage 1 and the Head of Publicity and Social Media has asked that the project complies with NowByou's procedures for data privacy and confidentiality.

This requirement has been documented in the project initiation documentation. The multichannel campaign is being implemented by an external marketing agency during stage 3.

The team managers implementing the campaign will need to understand this requirement.

According to the 'plans' practice, where should the team managers find this information?

- A. Commercial management approach
- B. Project product description
- C. Stage plan

D. Work package description

D. Correct. A work package description contains everything a team manager needs to know to complete the work, including "Techniques and procedures: Requirements for how the work is to be done; Constraints: restrictions or limits on the work, such as authorized work hours, safety, and security measures; References: Applicable references from higher level plans."

5. The project is at the end of stage 2. The project executive has suggested that stage 3 should be divided into two separate stages. The first stage (stage 3a) would implement the chosen campaign option, and the second one (stage 3b) would close the project.

The project executive has instructed the project manager to plan both stage 3a and stage 3b at the end of stage 2 to save time at the end of the next stage.

Is this decision by the project executive an appropriate application of the 'plans' practice, and why?

A. Yes, because the 'closing a project' process should provide a fixed point at which acceptance of the delivered multi-channel campaign should be confirmed

B. Yes, because the work package to implement the chosen campaign option should be in the stage 3a plan, and the work to close the project should be in the new stage 3b plan

C. No, because the activities to complete the 'closing a project' process should be planned at the end of stage 2, not at the end of stage 3a

D. No, because the activities to complete the 'closing a project' process should be planned towards the end of the final stage

C. Correct. "The stage plan for initiating a project is created during the process of starting up a project. Subsequent stage plans are prepared near the end of the current stage. This approach allows a stage plan to: be produced close to the time when the planned activities will occur." Therefore, the activities of the 'closing a project' process should be planned at the end of stage 2, not as a separate stage. In addition, the 'closing a project' process is not a separate stage, it is part of the final stage.

6. The project is in stage 1 and the Contracted Project Manager is preparing the project plan. The Contracted Project Manager has proposed that two stage plans should be produced for the rest of the project one at the end of stage 1 and the other at the end of stage 2.

Is this proposal an appropriate application of the 'plans' practice, and why?

A. Yes, because the project manager should ensure that there is no overlap in the scope of any of the work packages

B. Yes, because the project manager should prepare a stage plan for the next stage, at the end of the preceding stage

C. No, because the project manager should include a schedule of activities to close the project in the stage 3 plan

D. No, because the project manager should have produced the initiation stage plan during the 'starting up a project' process

B. Correct. "A stage plan is prepared for each stage." There are three stages in this project. The first stage is the initiation stage and the stage plan for this stage should have been produced during the 'starting up a project' process. "Initiating a project takes time and consumes resources.

The work should be planned and approved to ensure that initiation is not aimless and unstructured." Therefore, there are 2 remaining stages (stages 2 and 3) for which stage plans should be prepared at the end of the preceding stage.

Here are three actions related to developing the stage 2 plan.

Which role (A-F) should be responsible for each action?

Choose only **ONE** role for each action. Each role can be used once, more than once, or not at all.

- A. Business layer
- B. Project executive
- C. Senior user
- D. Senior supplier
- E. Project manager
- F. Team manager

7. Check the stage 2 plan to ensure enough time has been allowed to obtain input and feedback from the User Group on the high-level requirements gathering and options analysis

C. Correct. The senior user should "ensure that project plans and stage plans remain consistent with the user perspective." This should include checking that there is enough time allowed in the plan for User Group input.

8. Advise the project manager on how to prepare the stage plan to comply with the NowByou requirements

A. Correct. The business layer should "provide the planning standards required by the business." This should include providing any existing planning standards based on previous projects as the project management maturity of the organization is very low.

9. Prepare the schedule for the requirements gathering work package for input to the stage 2 plan

F. Correct. The team manager should "prepare schedules for each work package."

10. The Campaign against Discrimination is a critical project for NowByou. As a result, it is important that the project delivers within the agreed project time tolerances.

The Contracted Project Manager has a track record of successful delivery of this type of project. Therefore, it has been decided that the entire project time tolerance should be allocated to stage 3, when the new project manager will be working mostly on their own.

There was an issue with the TV campaign work package during the stage and some extra time is needed to complete the work package. The work will be completed within stage time tolerance.

According to the 'plans' practice, which role should authorize the extra time to complete the TV campaign during stage 3?

A. Business

B. Project executive

C. Project manager

D. Project assurance

C. Correct. The project manager should "Decide how stages and delivery steps are to be applied; Instruct corrective action when work-package-level tolerances are forecast to be exceeded."

The issue in the TV campaign work package can be resolved by the project manager within stage tolerances. This also means that it is resolved with project tolerances as all the project time tolerance has been allocated to stage 3.

11. The Contracted Project Manager is creating the project plan in stage 1 based on a better understanding of the requirements gathering and options analysis work in stage 2. They have also obtained more detailed estimates of time and cost from the external marketing agency implementing the campaign in stage 3.

Is this an appropriate application of the 'plans' practice, and why?

A. Yes, because the project manager should identify the work packages that the external marketing agency will be delivering in stage 3 to implement the campaign

B. Yes, because the project manager should create the project plan to include more detailed cost and time estimates to ensure continued business justification

C. No, because the project manager should create the project plan during the 'initiating a project' process, rather than during stage 1

D. No, because the project manager should include the updated cost and time estimates in the business case to support continued business justification

B. Correct. When the 'plans' practice applies the 'ensure continued business justification' principle, this is achieved by "aligning the plan's performance targets to the business case objectives and providing estimates upon which the project board can confirm whether the project is viable."

12. During stage 1, the Contracted Project Manager is preparing the project plan. In order to do this, the Contracted Project Manager is working with the Director of Campaigns and the Head of Publicity and Social Media to understand more about the 'options analysis' product, what needs to be produced, who will approve it and the associated quality specifications.

Is this an appropriate application of the 'plans' practice, and why?

A. Yes, because the project manager should produce the product description for the 'options analysis' to be able to estimate realistic time and cost in the project plan

B. Yes, because the project manager should define the 'options analysis' product as a major product to be delivered by the project

C. No, because the project manager should describe the 'options analysis' as a major product in the project product description

D. No, because the project manager should create the 'options analysis' product description when planning stage 2 in detail

A Correct. When 'writing product descriptions' as part of the 'defining and analysing products' step of the PRINCE2 technique for planning, "the project manager elicits the user's requirements for these products and documents them in one of more product descriptions.

The project manager also consults with subject matter experts to determine

requirements related to how these products are procured, developed, tested, used, and supported after acceptance.

The aim of this more detailed step is to confirm that the requirements for the major products have been described in sufficient detail to enable realistic scheduling and estimation."