Tailoring PRINCE2 to the Project Environment
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What is Tailoring? Embedding (Relevant to Practitioner Examination)?

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

Embedding is the adoption of PRINCE2 across an organization. Embedding focuses on process responsibilities, establishing of standards, providing training to the employees to meet the established standards, and integration of the PRINCE2 method with the business processes, etc.

Applying the principles

• PRINCE2 principles are universal and always applicable; they are not tailored
• Practitioners adapt the PRINCE2 themes and processes to the project environment
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Adapting the themes
• This does not necessarily mean modifying the method
• The environmental & project factors are incorporated into the project’s strategies & controls
• Relevant policies & standards are captured & documented in the Risk Management Strategy, Quality Management Strategy, Configuration Management Strategy and Communication Management Strategy

Applying the organization’s terms and language
• The method may need to be adapted to incorporate the terms & language of the corporate or programme organization
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Adapting the management products
• Product Description outlines are provided for those management products that require particular purpose or composition for their use by the themes and processes
• Product Descriptions may have to be modified when management products are adapted while tailoring PRINCE2.

Adapting the roles
• PRINCE2’s organization structure needs to be carefully considered for all projects
• Roles need to be adapted to match individual’s actual capability and authority

Adapting the processes
• All PRINCE2 process activities need to be done
• Depending on the adoption of roles and management products, the responsibilities for performing the activities and references to the management products may need to change.
Projects in a Programme Environment

- Projects typically change or produce something and are then disbanded
- The benefits of the undertaking are likely to accrue after project completion
- Programmes are typically used to help transform organizations
- Programme organizations tend to have a lifespan that covers the realization of benefits

Tailoring PRINCE for a Programme Environment

**Business Case**

- The project Business Case is aggregated into the overall programme Business Case
- It is reduced in content
- May comprise just budget details, benefits list & a statement of how the project contributes to the programme blueprint
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Organization
- OGC defines a programme board comprising of a Senior Responsible Owner (SRO), a Programme Manager, one or more Business Change Managers, representatives of corporate functions, the lead supplier and project Executives of the projects within the programme
- SRO ensures that the programme objectives are met and benefits are delivered
- Programme Manger is responsible for set up and day to day management of the programme
- The Business Change Manager is responsible for benefits definition & management

Quality
- The project’s Quality management strategy is derived from the programme’s Quality Management Strategy
- Quality assurance and control activities are carried out by members of the programme management team
- Programme’s design authority provides advice & guidance to the Project Manager on quality methods to be used
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Tailoring PRINCE for a Simple Projects

Organization
• This is the theme most affected by simple projects
• Executive and Senior User roles are often combined
• Project assurance may be carried out by the Project Board
• Project Manager carries out roles of the Team Manager
• Project Manger may also functions as Project Support

Business Case
• Some form of Business Case is required
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Plans
• Product Descriptions for key deliverables
• A simple plan in the form of a schedule of who is producing, reviewing and approving products
• Key milestones

Quality
• An understanding of levels of quality required in the project

Risk
• Analysis of risks facing the project
• Actions to be taken to implement risk responses
• Communicate risk status via Checkpoint and Highlight Reports
Change
• A simple method of controlling changes to the project and managing the configuration of the products

Progress
• Some form of agreed written or oral controls and reporting requirements

Processes
• All processes are relevant in a simple project
• Starting up a Project process can be less formal
• It should, however, not be bypassed
• Starting up a Project and Initiating a Project processes can be combined
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Management Products

• Choice & format of management products can help reduce the management effort in small projects

• Create documents that physically contain more than one management product

• Sets of documents required are the Project Initiation Documentation, Daily Log & End Project Report

• Management products not required are Stage Plan, Checkpoint Reports, Work Packages, End Stage Report & Issue Report
Tailoring PRINCE2 for a Commercial Customer/Supplier Environment

(Relevant to Practitioner Examination)

- The main consideration, here, is the recognition of there being two sets of Reasons for undertaking the project: Management systems, Governance structures & Corporate cultures

Business Case

- Presence of 2 Business Cases: Suppliers and Customers
- Both must demonstrate continuous business justification

Organization

- Key decisions are: who takes the role of Senior Supplier, Project Manager
- There are numerous ways in which the team roles can be assigned
- Key objective is to ensure that both supplier & customer maintain sound business justification
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Quality
• The Quality Management Strategy defines whether the project conforms to the suppliers’, customers’ or a combination of suppliers’ and customers’ quality management systems

Plans
• Contracts should ideally cover the whole project
• Purchase Orders & milestone payments should be aligned to each management stage

Risk
• May need more than one Risk Register
• In case of joint Risk Register, care should be taken as to whose risk it is & risk owner appointed accordingly
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Change
• Change control procedure in the Configuration Management Strategy & provisions for changes in the contract must be aligned
• Change budget, if used should be aligned to customer’s purchasing procedures & supplier’s business approval procedures

Progress
• Frequency, format & formality of reviewing & reporting need to be aligned to needs of both organizations

Processes
• Key changes will be to the Starting up and Initiating a Project processes
• Another key change is alignment of the suppliers’ business approval process with the Starting up a Project process
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Management Products
• The Project initiation Documentation should focus on how to make sure that each party’s obligations are fulfilled
• Project initiation Documentation should be part of the contract documentation

Multi-Organization Projects
• Project where more than 2 organizations are involved

Project Type – Lifecycle Models
Tailoring PRINCE2 to work with specialist lifecycle models principally involves:
• Aligning management stages to developmental life cycle
• Using tolerances to match development focus
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- Integrating specialist roles into the project management team structure
- Using PRINCE2 for the project management products

**Project Type - The Evolving Project**
- Projects where the specifications evolve as the project progresses
- Specifications are often contentious & open to negotiation throughout the project’s life

**Project Type - The Feasibility Project**
- In cases, where a feasibility study is required, the study may be considered as a separate, distinct project
- The output here is just an option
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Sector Differences
- Main difference between private and public sector projects is the nature of Business Case
- Within UK public sector, two considerations may require PRINCE2 to be tailored viz. whether the project requires an SRO and whether the project is subject to OGC

Senior Responsible Owner
- Is not a PRINCE2 defined role
- Executive reports to SRO
- SRO undertakes Executive role or appoints person to undertake Executive role
OGC Gateway Review
• Examines projects at key decision points in lifecycle
• Delivers peer-reviews

Project Management Bodies of Knowledge
• PRINCE2 should not be confused with a Body of Knowledge (BoK)
• PRINCE2 provides a framework for what needs to be done, when and by whom
• BoK provides a range of techniques of how things can be done