

# PM<sup>2</sup>, hacia un lenguaje común europeo en la Economía de Proyectos



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## Asociación de Profesionales en la Gestión de Proyectos ([www.apgp.es](http://www.apgp.es))



Asociación sin ánimo de lucro, creada en 2012, que tiene como **objetivo fundamental** instaurar la profesionalización de la **Gestión de Proyectos** mediante:

- El **Desarrollo, Integración, Promoción, Fomento y Mejora** de la **Gestión de Proyectos**.
- Convertirse en un **foro reconocido** de libre **intercambio de conocimiento** sobre la **Gestión de Proyectos**.
- **Difundir los fundamentos** de la **Gestión de Proyectos** a todos los interesados.

1. ¿Qué es y por qué?
2. Conceptos clave
3. Los Pilares de PM<sup>2</sup>
  1. Governance
  2. Lifecycle
  3. Processes
  4. Artefacts
4. Estrategia, PPM y Agile PM<sup>2</sup>
5. Principales documentos y fuentes de información

La información contenida en esta presentación, así como logos y figuras, se han extraído de «The PM2 Project Management Methodology Guide – Guide 3.0» y otras fuentes de la propia UE.

Para cualquier información:

[https://ec.europa.eu/isa2/solutions/open-pm2\\_en](https://ec.europa.eu/isa2/solutions/open-pm2_en)

Contacto: [ec-pm2@ec.europa.eu](mailto:ec-pm2@ec.europa.eu)

# Antes de empezar...

Por gentileza de



Antonio  
Nieto-Rodriguez



# SENIOR MANAGEMENT FOCUS

**The Project Revolution**

Running the Business



90%

Changing  
the Business



10%

# SENIOR MANAGEMENT FOCUS

**The Project Revolution**

Running the Business



30%

Changing the Business



70%



# 1. ¿Qué es y por qué?

The EU *spends* over **€ 959 988 million** (2014-2020).

- The EU budget is divided into more than 80 funds and programmes (European Structural and Investments Funds (ESIF) representing 33% of the total budget).
- Around **6%** of the budget goes to the administration of the European institutions (**€ 57 599 M**) whereas around **94%** is allocated to various **European programmes** (**€ 902 389 M**).
- There are more than 100 authorities managing EU funds. **20% of these are managed directly** by the European Commission (**€ 180 478 M**). The remaining 80% are managed by other authorities.



European Commission President Jean-Claude Juncker  
[Speech before the European Parliament](#) on 15 July 2014, [SPEECH/14/585](#)  
& Press Conference, Brussels, 10 September 2014

*"I want a European Union that is bigger and more ambitious on big things, and smaller and more modest on small things."*

*"Form has to follow function."*

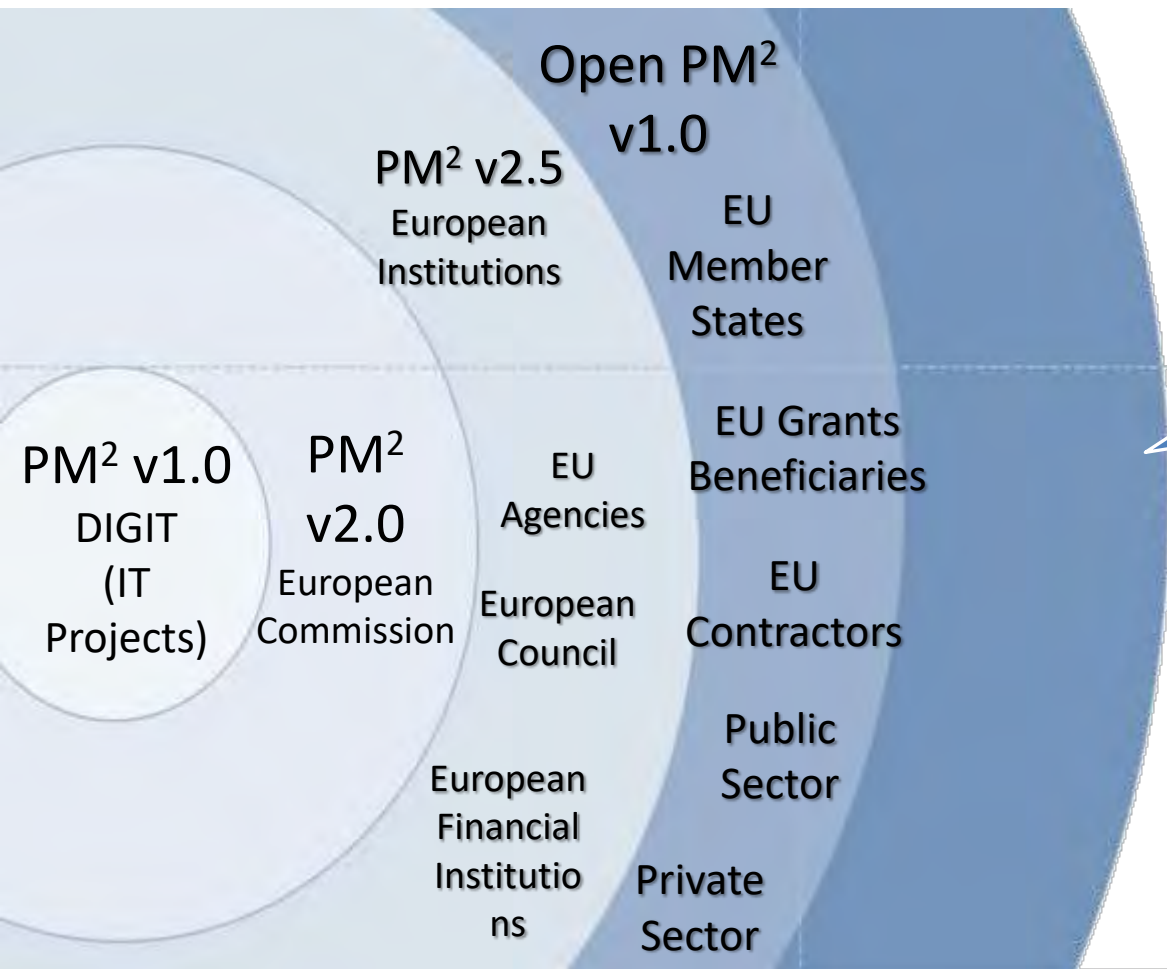
*"... to overcome silo-mentalities and introduce a new collaborative way of working in areas where Europe can really make a difference."*

*"... to be able to deliver quickly and effectively."*

*"... to organise the new Commission around project teams."*

*"We will be doing less, but we will be doing our work more **effectively**. We will be working as a **team** and not in silos. And we will **deliver**."*

*"... to be in charge of a number of **well-defined priority projects**, ...in compositions that may **change** according to need and to possible new projects developing over time, and be in charge of **steering and coordinating project teams**, ... depend on the contributions of his/her **Project Team**, ... to **successfully complete the projects assigned**."*



Europe

# 1. ¿Qué es y por qué?

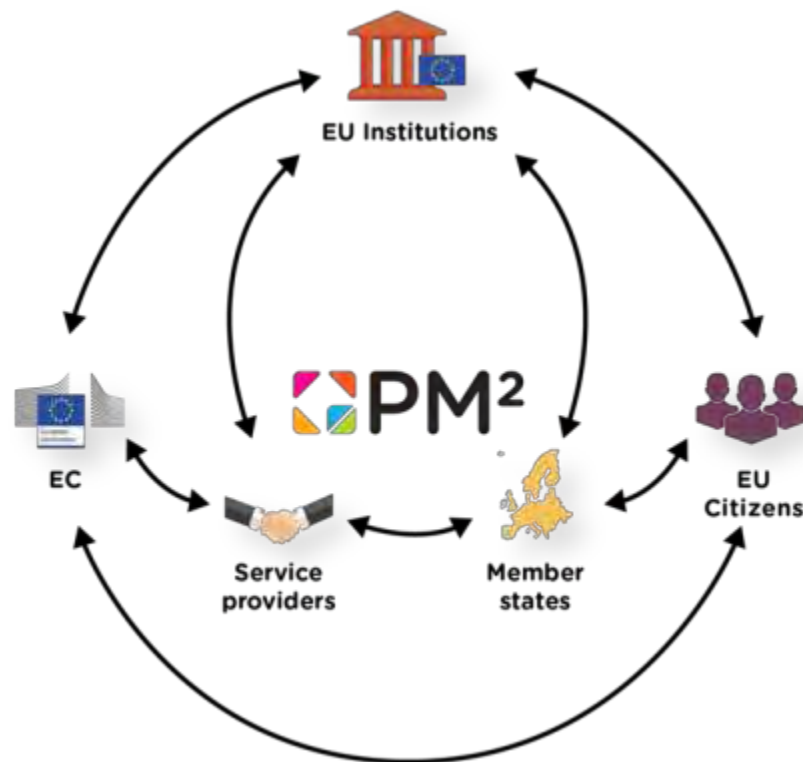


PM<sup>2</sup> es una metodología de gestión de proyectos diseñada por la Comisión Europea. Su propósito es permitir que los equipos de proyecto gestionen sus proyectos de manera eficaz, y ofrecer soluciones y beneficios a sus organizaciones y partes interesadas.

PM<sup>2</sup> es adecuado para cualquier tipo de proyecto, especialmente aquellos relacionados con el sector público, o programas y subvenciones de la UE.

PM<sup>2</sup> v3.0 es la versión más reciente, abierta y gratuita del PM<sup>2</sup> desarrollado por la Comisión. Incorpora elementos de las mejores prácticas, normas y metodologías aceptadas a nivel mundial.

# 1. ¿Qué es y por qué?



"One common PM Methodology open to all EU Institutions, Member States, Contractors, and EU Citizens."

"One **common** PM Methodology open to all EU Institutions, Member States, Contractors, and EU Citizens."



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"One common PM Methodology **open** to all EU Institutions, Member States, Contractors, and EU Citizens."

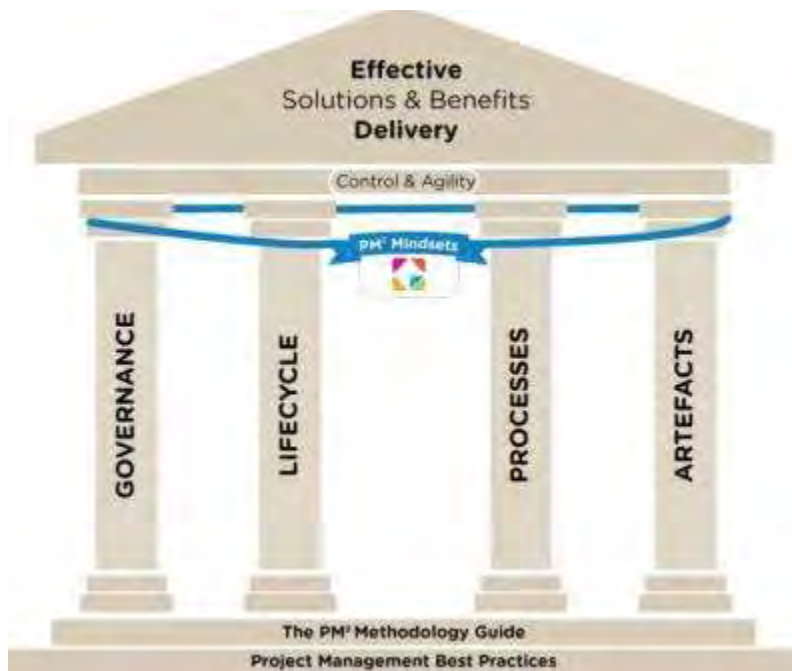
"One common PM Methodology open to all EU Institutions, Member States, Contractors, and EU Citizens."

## 2. Conceptos clave

La Casa de PM<sup>2</sup>  
PM<sup>2</sup> Mindsets

La Casa de PM<sup>2</sup>  
PM<sup>2</sup> Mindsets

## La Casa de PM<sup>2</sup>



The PM<sup>2</sup> Methodology is built on PM best practices and is supported by **four pillars**:

- a **project governance model** (i.e. Roles & Responsibilities)
- a **project lifecycle** (i.e. Project Phases)
- a set of **processes** (i.e. Project Management activities)
- a set of project **artefacts** (i.e. templates and guidelines).

La Casa de PM<sup>2</sup>  
PM<sup>2</sup> Mindsets



### PM<sup>2</sup> Mindsets

The PM<sup>2</sup> Mindsets are the **attitudes and behaviours** that help project teams **focus on what is crucial** to achieve their project's goals. They help navigate the complexities of managing projects in organisations and make the PM<sup>2</sup> Methodology both **more effective and complete**.

### PM<sup>2</sup> Mindsets

The PM<sup>2</sup> Mindsets are the glue that holds the PM<sup>2</sup> processes and practices together, and provide a **common set of beliefs and values** for all PM<sup>2</sup> practitioners. The PM<sup>2</sup> Mindsets:

- help project teams **navigate through the complexities** of project reality.
- help project teams (re)position **project management goals in a wider organisational context**.
- remind project teams **what is important for project success**.
- are useful **reminders of effective attitudes & behaviours**.

### PM<sup>2</sup> Mindsets | Infrequently Asked Questions (IAQs)

1. Do we know what we are doing?
2. Do we know why we are doing it? Does anyone really care?
3. Are the right people involved?
4. Do we know who is doing what?
5. Deliver at any cost or risk?
6. Is this important?
7. Is this a task for “them” or for “us”?
8. Should I be involved?
9. Have we improved?
10. Is there life after the project?

### PM<sup>2</sup> Mindsets | Infrequently Asked Questions (IAQs)

**Do we know what we are doing?**

Tip: Develop a clear and shared project vision. Manage the project using a holistic approach and optimise the whole project, not just parts of it. Follow a process but stay Agile and try to regularly remind yourself why you are doing something.

**Do we know why we are doing it? Does anyone really care?**

Tip: Make sure your project matters. Understand its goals, value and impact, and how it relates to the organisational strategy. Define upfront what project success is and deliver maximum value and real benefits, not just outputs.

**Are the right people involved?**

Tip: People make projects work. The primary criterion for involving people and assigning project roles should be to serve the needs and objectives of the project, and not politics, friendship, functional hierarchy, proximity or convenience.

### PM<sup>2</sup> Mindsets | Infrequently Asked Questions (IAQs)

**Do we know who is doing what?**

Tip: Know what you should be doing, and make sure others know what they should be doing. Is it clear to everyone? Clearly define and understand roles, responsibilities and accountabilities.

**Deliver at any cost or risk?**

Tip: Show respect for people's work and organisational funds and avoid high-risk behaviour and tactics. Always keep in mind that it is not just about the end result -how you get there also matters. Manage your projects based on positive values and principles.

**Is this important?**

Tip: Everything is NOT equally important. Identify, and agree on, the project's Critical Success Criteria (CSC), Minimum Viable Product and Critical Success Factors (CSFs), and allocate effort and attention both tactically and strategically for the benefit of both the project and project management goals.

### PM<sup>2</sup> Mindsets | Infrequently Asked Questions (IAQs)

**Is this a task for “them” or for “us”?**

Tip: Make sure that client and provider groups work as one team towards a common goal. Real teamwork really works; so foster clear, effective and frequent communication.

**Should I be involved?**

Tip: Contribute from any position. Be proud of the skills, value, and positive attitude you bring to the project. Help everyone who needs to be involved get involved. Promote and facilitate the contribution of all stakeholders.

**Have we improved?**

Tip: Commit to ongoing self- and organisational improvement by gathering and sharing knowledge. Project teams should reflect on how to become more effective, and adjust their behaviour accordingly.

**Is there life after project?**

Tip: The product (or service) lifecycle has just begun! Make sure you have contributed to its success

# 3. Los Pilares de PM<sup>2</sup> Componentes

Governance  
Lifecycle  
Processes  
Artefacts



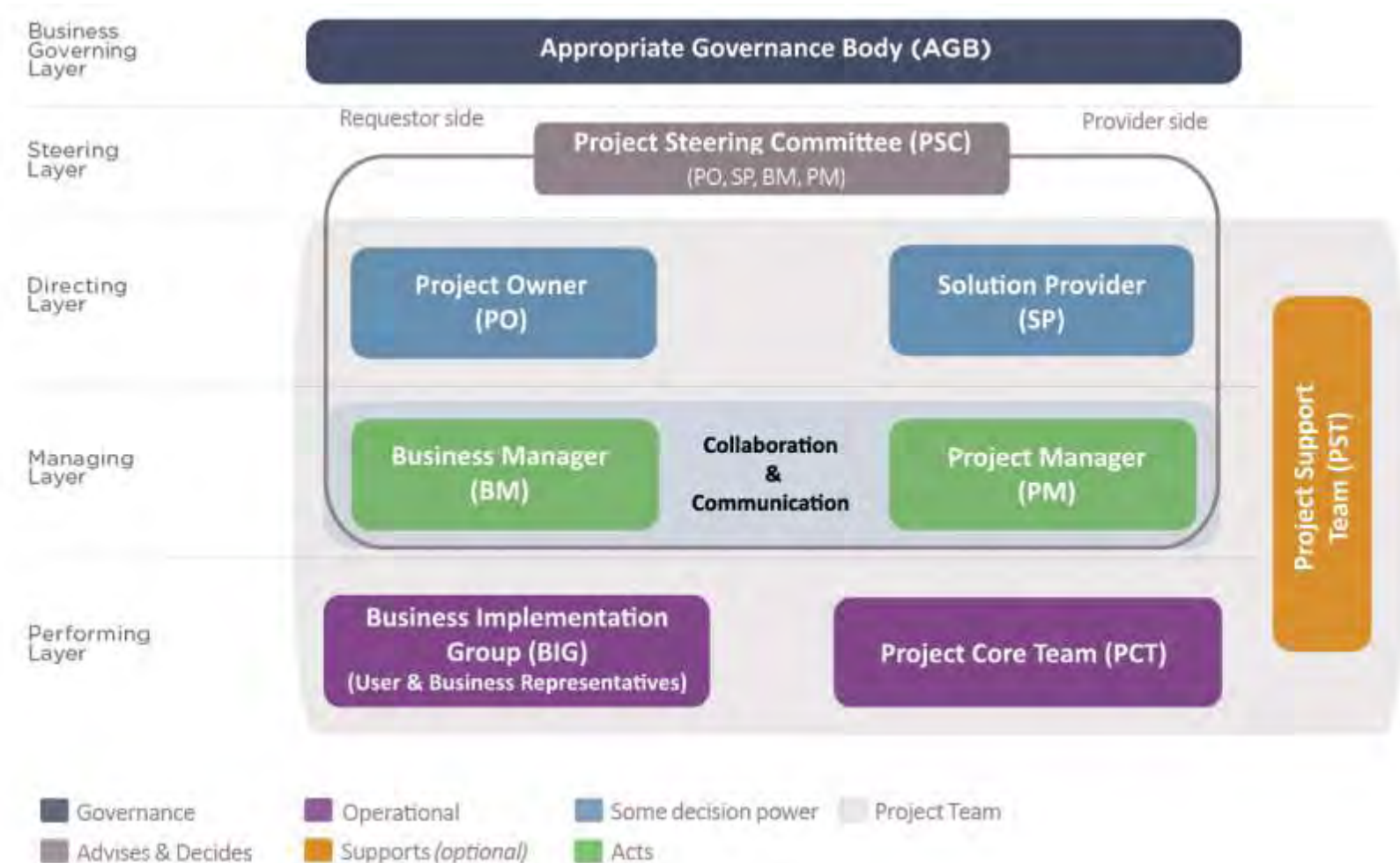
Governance

Lifecycle

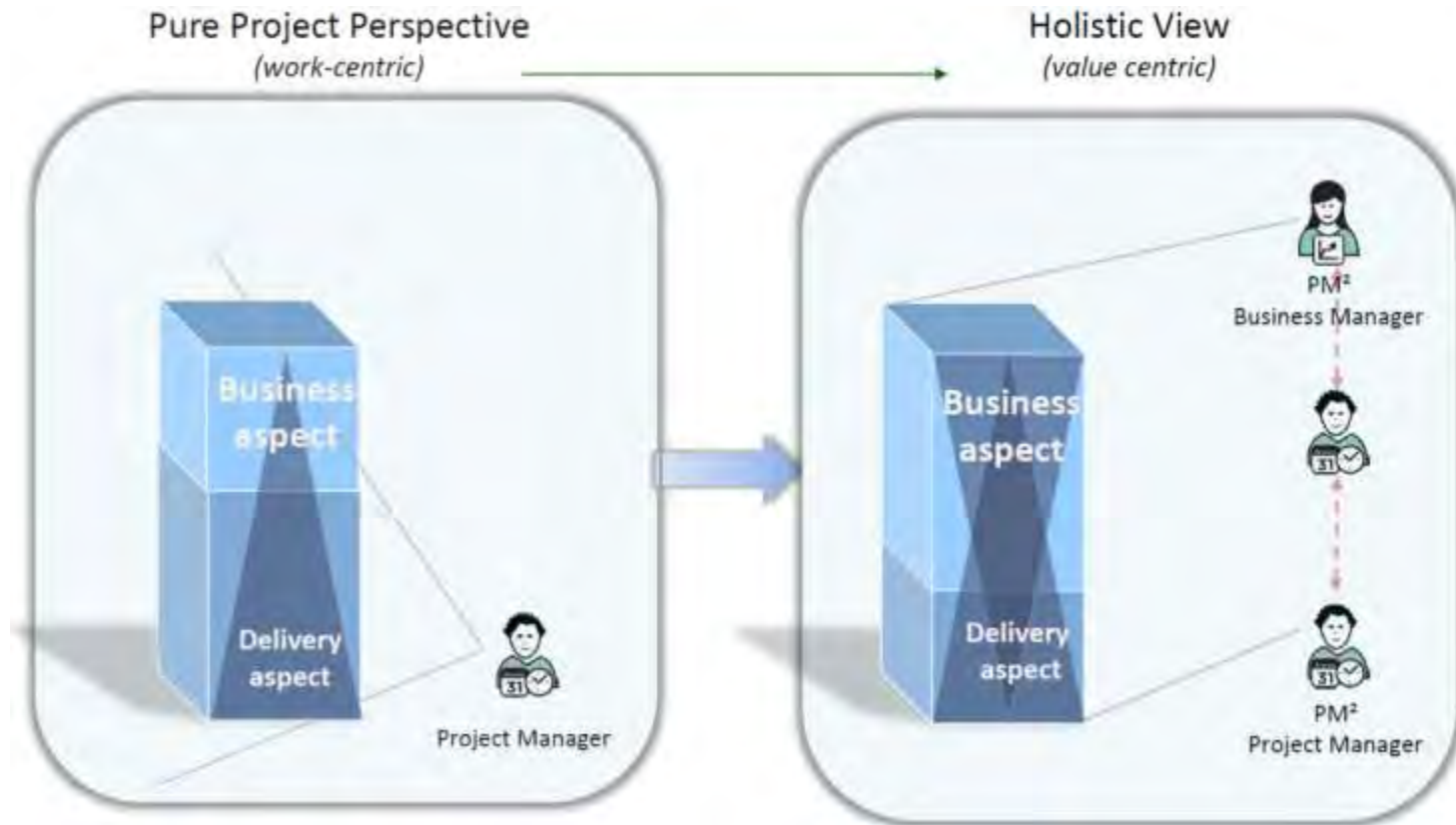
Processes

Artefacts

## Governance | roles and responsibilities

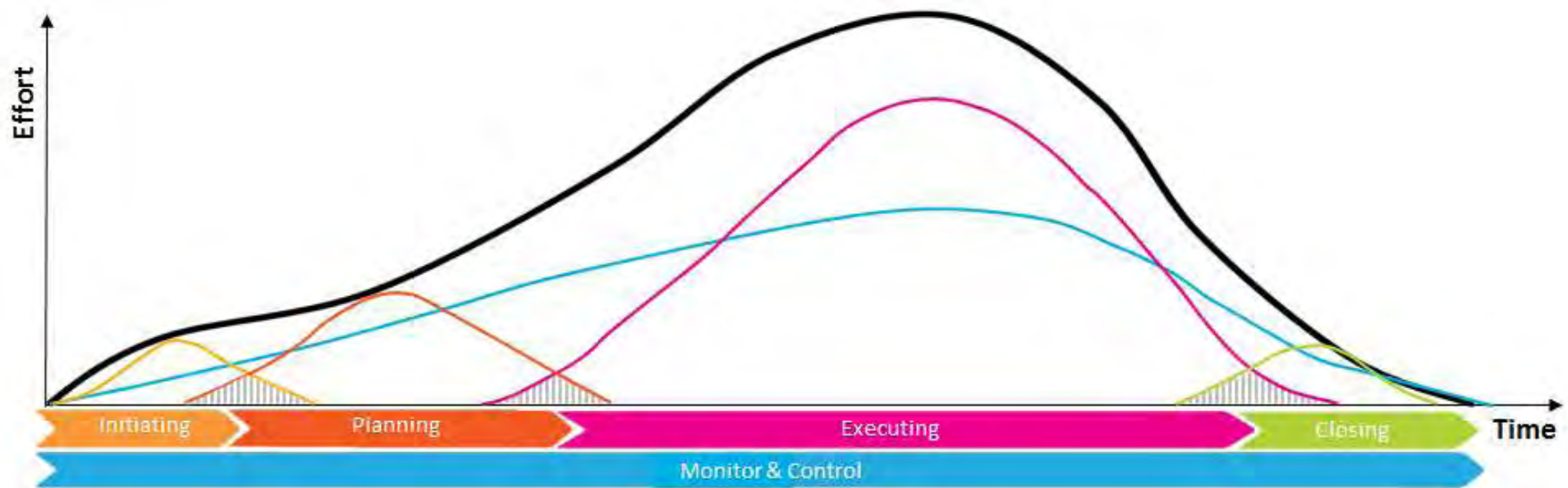


## Governance | work-centric vs. value-centric



Governance  
**Lifecycle**  
Processes  
Artefacts

## PM<sup>2</sup> lifecycle



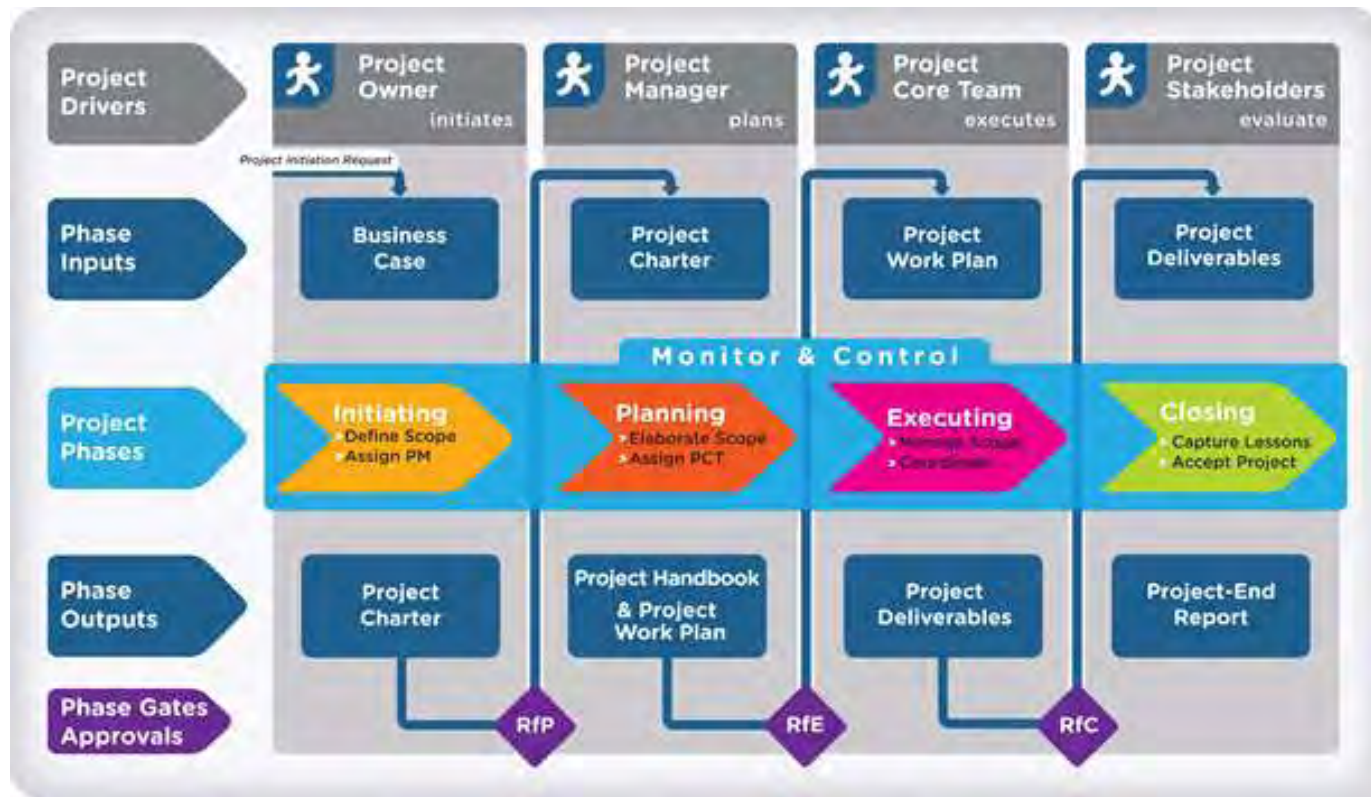
## PM<sup>2</sup> lifecycle

1. Initiating  
Define the desired outcomes, create a Business Case, define the project scope, and get the project off to a good start.
2. Planning  
Assign the Project Core Team, elaborate the project scope, and plan the work.
3. Executing  
Coordinate the execution of the project plans.
4. Closing  
Coordinate the project's formal acceptance, report on the project's performance, capture lessons learned and post project recommendations, and administratively close the project.

**Monitor & Control:** Throughout the project's duration, monitor and control all project work and management activities. Monitor project variables, measure progress, manage changes, address risks and issues and identify corrective actions as per the project's needs.

Governance  
Lifecycle  
**Processes**  
Artefacts

## Processes | general overview





## Processes | main documents

Business Case	Captures the reasoning behind the project, provides justification and establishes the budgetary constraints.
Project Charter	Builds on the Business Case and defines the project scope and the high-level requirements and deliverables.
Project Deliverables	The complete set of project's deliverables as defined in the Project Charter and the Project Work Plan.
Project Handbook	Presents the project management objectives and the overall management approach, and documents the roles and responsibilities.
Project Initiation Request	Formalises the commitment to explore further a problem, need or opportunity and captures the context.
Project Work Plan	Includes a breakdown of the work to be carried out, estimates of the effort and costs involved, and the project schedule.
Project-End Report	Summarises the project experience, project performance, lessons learned and both successful project practices and pitfalls.

## Processes | activities



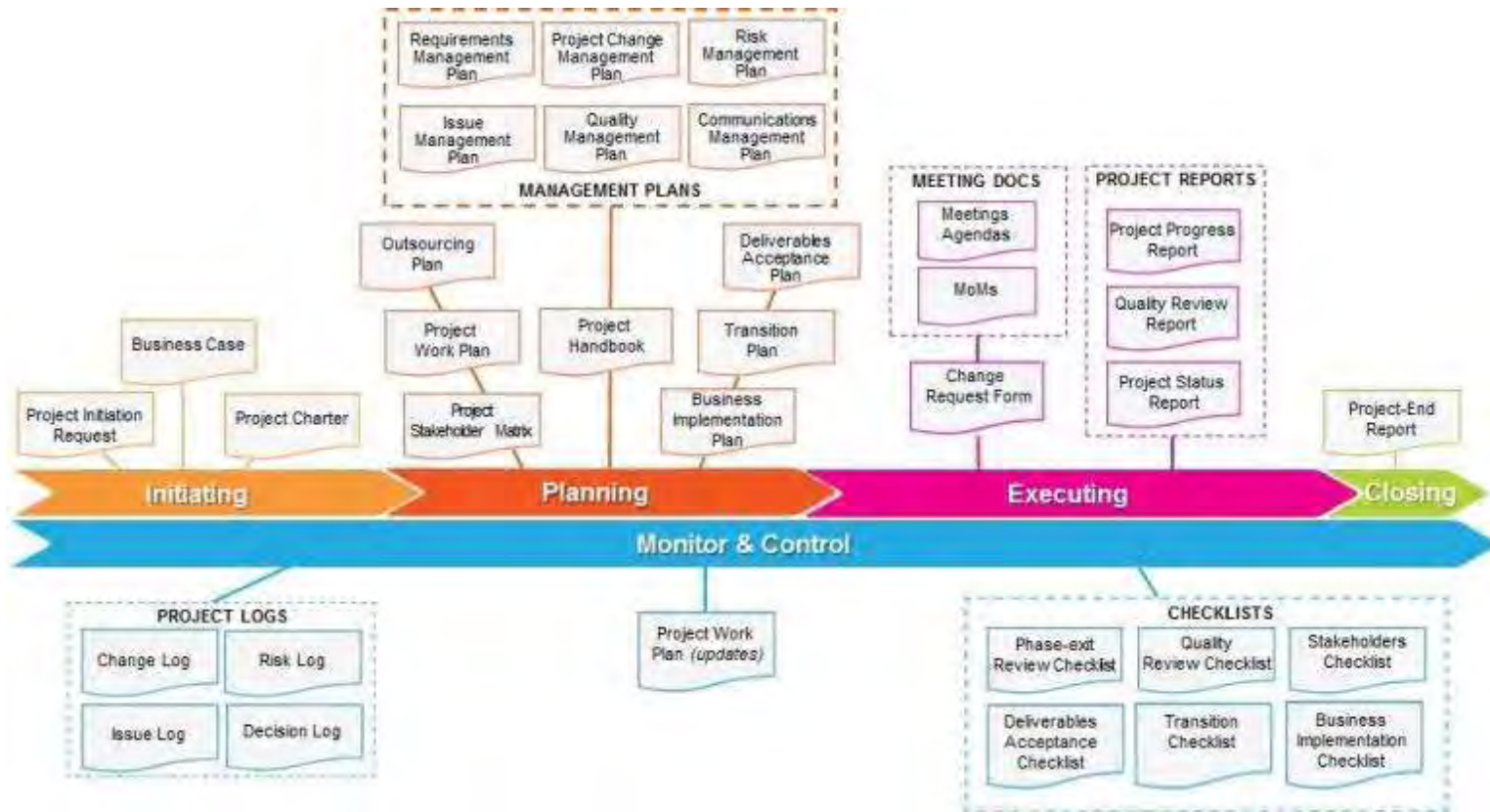
Governance  
Lifecycle  
Processes  
**Artefacts**

**\*\*Artefacts: documentos de gestión del proyecto.**

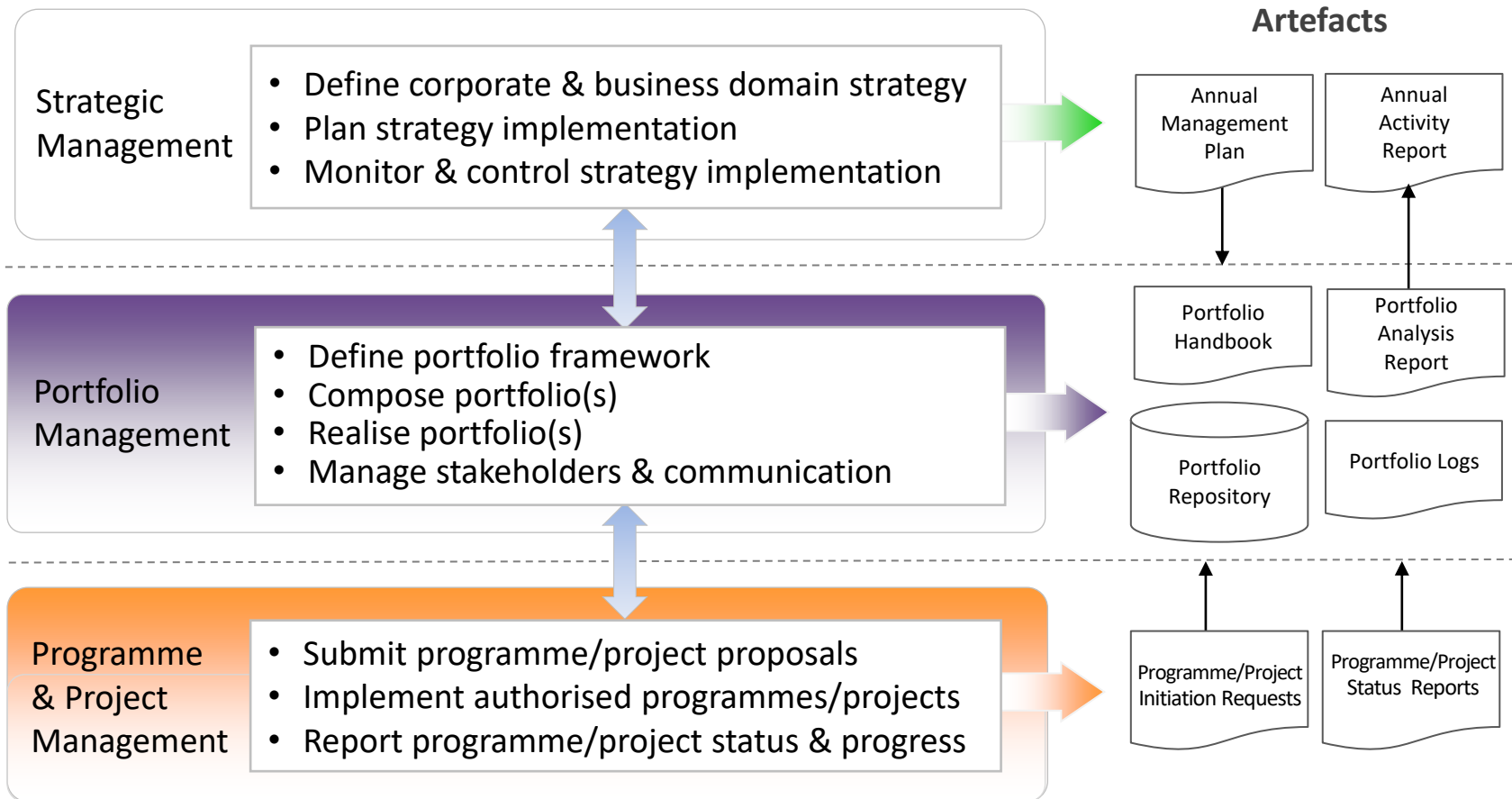
*Son una serie de plantillas de referencia para cubrir los principales aspectos clave en el ciclo de vida del proyecto.*

*Están disponibles en la web de PM<sup>2</sup>.*

## Artefacts landscape



## 4. Estrategia, PPM y Agile PM<sup>2</sup>



## Artefacts landscape

### Processes



### Roles

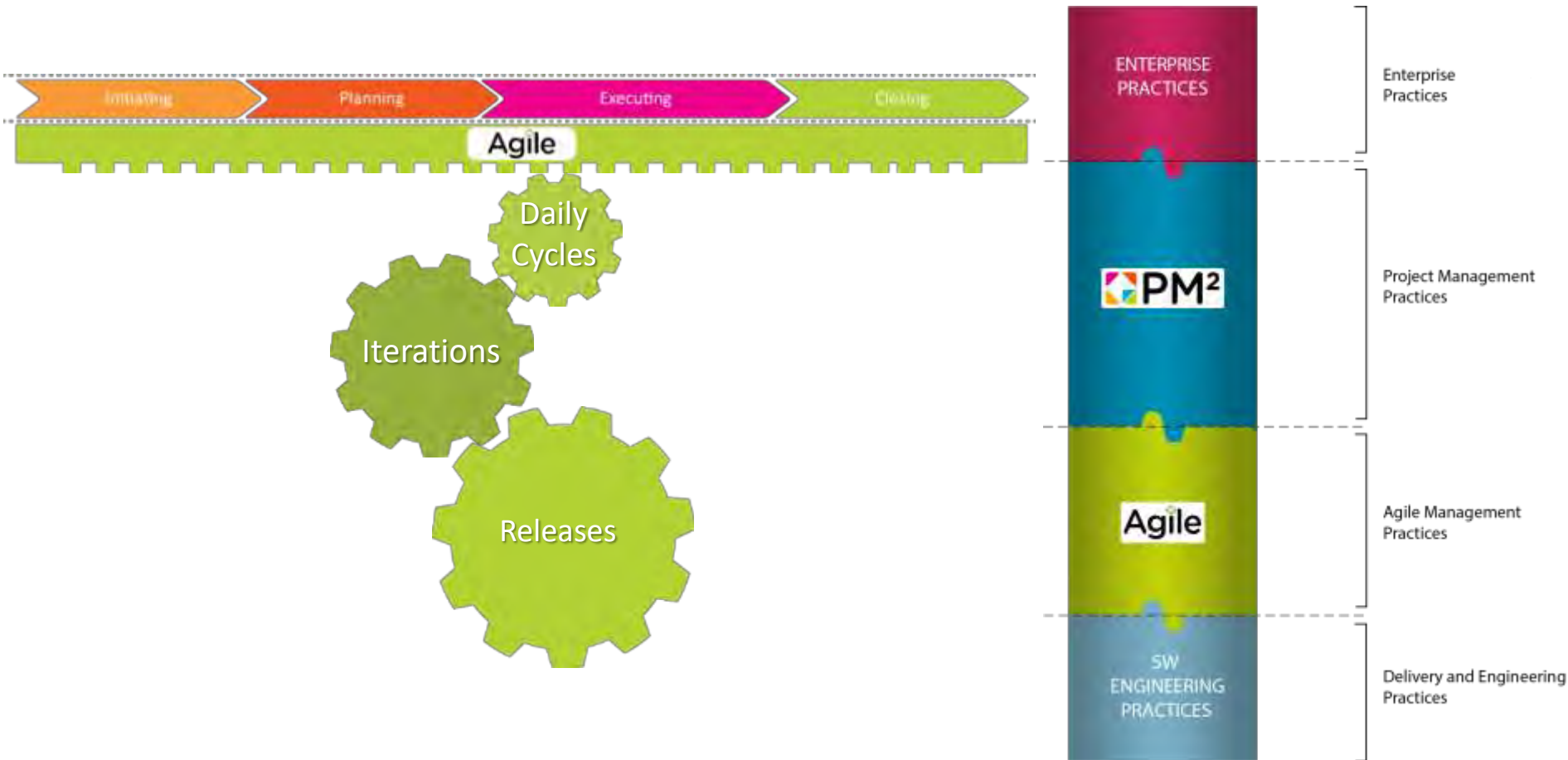


### Artefacts





# 4. Agile PM<sup>2</sup>



Cortesía: Elias Michelioudakis, European Commission, CoEPM<sup>2</sup>

# 5. Principales documentos y fuentes de información

Documentos desarrollados (se irán haciendo públicos poco a poco)



Lo que ya está: Guía de PM<sup>2</sup> v3.0 y resúmenes



## Artefacts

INITIATING PHASE	PLANNING PHASE	EXECUTING PHASE	CLOSING PHASE
Project Initiation Request	Project Handbook	Project Status Report	Project-End Report
Business Case	Project Stakeholder Matrix	Project Status Report (EVM)	
Project Charter	Project Work Plan	Project Progress Report	
	Outsourcing Plan	Change Request Form	
	Deliverables Acceptance Plan		
	Transition Plan		
	Business Implementation Plan		
	<b>Project Management Plans</b>		
	Requirements Management Plan		
	Project Change Management Plan		
	Risk Management Plan		
	Issue Management Plan		
	Quality Management Plan		
	Communication Management Plan		
MONITOR & CONTROL			
Meeting Agenda	Risk Log	Phase-exit Review Checklist	
Minutes of Meeting (MoM)	Issue Log	Quality Review Checklist	
	Decision Log	Deliverables Acceptance Checklist	
	Change Log	Transition Checklist	
		Business Implementation Checklist	
		Stakeholder Checklist	

## Fuentes de información

V Jornadas de Dirección de Proyectos |  
Regreso al Futuro... de la Dirección de Proyectos



Masterclass Elias Michelioudakis  
Open PM<sup>2</sup> methodology. How projects will be managed in Europe?  
<http://innovarioja.tv/index.php/video/ver/1874>

Ponencia Elias Michelioudakis  
A European vision on Project Management: Open PM<sup>2</sup>  
<http://innovarioja.tv/index.php/video/ver/1870>

## Fuentes de información

Web oficial Comisión Europea

[https://ec.europa.eu/isa2/solutions/open-pm2\\_en](https://ec.europa.eu/isa2/solutions/open-pm2_en)

Guía de PM<sup>2</sup> versión 3.0 (sólo en inglés por el momento)

<https://publications.europa.eu/en/publication-detail/-/publication/ac3e118a-cb6e-11e8-9424-01aa75ed71a1>

Wiki PM<sup>2</sup> (con todos los recursos, incluyendo las plantillas)

<https://webgate.ec.europa.eu/fpfis/wikis/display/openPM2/>

\*gratuito, simplemente es necesario registrarse.

Join-up

<https://joinup.ec.europa.eu/collection/open-pm2-project-management-methodology>

# Gracias.

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