FAKULTA SOCIÁLNÍCH STUDIÍ
Masarykova univerzita

Projects in an International Context

Case Study and Exercise Book

Exercises 1 to 4

PRINCE2®
TRAINING ORGANIZATION ACCREDITED BY
PEOPLECERT ON BEHALF OF AXELOS

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Section I - Document Control Section

DOCUMENT HISTORY

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REFERENCES

  A. Axelos, 2017. *Managing Successful Projects with PRINCE2®*. 2017 Edition. The Stationery Office

  B. PeopleCert PRINCE2-2017_Edition_FOUNDATION_EN_CEW

PRODUCT IDENTIFIER

PR2-EN-L-MVZEB-180209-01

Revision Date	Summary of Changes	Version
15/11/2017	Original Version	01

DOCUMENT REVIEW

Name	Signature	Date	Version
Tuck MacRae	DIGITAL SIGNATURE	13/12/2017	01

DOCUMENT APPROVAL

Name	Signature	Date	Version

Section II – Seminar Schedule

1   SEMINAR SCHEDULE

****SEE THE COURSE SCHEDULE DOCUMENT IN THE IS COURSE MATERIALS SECTION FOR SPECIFIC LECTURE AND SEMINAR DATES****

2   REQUIRED READING

Textbook: *Managing Successful Projects with PRINCE2® 2017 Edition Manual*. Available at:
https://is.muni.cz/obchod/baleni/105111

Lecture / Seminar	Required Reading Prior to Class

Seminar 1	Read the case study in this Exercise Book. Download this book from the IS and print it prior to the first seminar.
	Read pages 157 to 194 of Managing Successful Projects, and Appendices:
	    A.2, Business Case
	    A.7, Daily Log
	    A.14, Lessons Log
	    A.16, Plans
	    A.21, Project Product Description
	    A.19, Project Brief
	Do exercises 1 and 2 and be prepared to discuss in seminar 1.

Seminar 2	Memorize the composition section of Appendix A.19, Project Brief. **Do exercise 3 and be prepared to discuss in seminar.**

Seminar 3	Read Pages 195 to 214 of Managing Successful Projects plus Appendices:
	    A.20, Project Initiation Documentation
	    A.5, Communication Management Approach
	    A.3, Change Control Approach
	    A.22, Quality Management Approach
	    A.24, Risk Management Approach
	    A.16, Plans
	    A.2, Business Case
	    A.1, Benefits Management Approach
	    Do exercise 4 and be prepared to discuss in seminar.

Seminar 4	Memorize the composition section of each document in the PID and the PID itself.

Seminar 5	**Do exercise 6 and be prepared to discuss in seminar.**
	Read pages 216 to 258 of Managing Successful Projects and Appendices:
	    A.4, Checkpoint Report A.12, Issue Register
	    A.6, Configuration Item Records A.13, Issue Report
	    A.7, Daily Log A.14, Lessons Log
	    A.9, End Stage Report A.23, Quality Register
	    A.10, Exception Report A.25, Risk Register
	    A.11, Highlight Report A.26, Work Package

Lecture / Seminar	Required Reading Prior to Class
Seminar 07	Read pages 260 to 270 of Managing Successful Projects and Appendix A.8, End Project Report. **Do exercise 8 and be prepared to discuss in seminar**
Seminar 08	Read about premature closure and review log, register and document creation exercises.
Seminar 09	Review all readings and exercises. Prepare for the exam.

3   GRADING

Type	Description	Duration	(%)
Graded Activity 1	Project Initiation Documentation	60 min	10
Graded Activity 2	Delivery Stage Activities	60 min	15
Graded Activity 3	Closure	60 min	15
Exam	Foundation Exam	60 min	60

Section III - Case Study & Seminar Exercises

Learning exercises based on the case study must be undertaken before the seminar sessions. These exercises have been developed to help you work through a PRINCE2 Project in the classroom. The goal is to enable you to experience the proper use of the themes, determine the correct content of the management products, and help you gain experience in determining the correct course of action given numerous events within the context of a given project scenario.

To facilitate this, we will introduce each of the exercises and explain the context in which you or your team is to operate. If you have any questions during the course of the exercise, do not hesitate to ask, our job is to facilitate a positive learning environment.

ORGANISATION FOR GLOBAL PEACE AND SECURITY

Note: **The story, all names, characters, and incidents portrayed in this scenario are fictitious. No identification with actual persons, places, organisations, buildings, and products is intended or should be inferred.**

Organisation for Global Peace and Security

The Organisation for Global Peace and Security (OGPS) represents an international alliance of 40 nations focused on ensuring peace and security on a global scale. The alliance's approach is based on the DIME (Diplomacy, Information, Military, Economics) model with their goal being four-fold: global crisis and disaster management, elimination of global terrorism, collective defence, and a reduction of regional economic disparities. The alliance also works in cooperation with its global partners. These include 100 partner countries around the world, as well as organisations such as the United Nations (UN), the European Defence Agency (EDA), the North Atlantic Treaty Organisation (NATO), the Organization for Security and Cooperation in Europe (OSCE), the African Union and the African Standby Force (ASF).

In recent years, the Radical Anarchists Movement (RAM) have consolidated once warring anti-establishment factions and mobilized their membership. This mobilization has resulted in an escalation of global terrorism. Ranging from cyber-attacks on financial centres and economic institutions to radicalized militias occupying vulnerable territories, RAM has increased its radical reach and international footprint. A number of humanitarian organisations have tried to intervene in areas affected by RAM but have suffered significant setbacks due to kidnappings and violent attacks on their members.

 Worries over RAM's rapid expansion have reached the assembly floors of many international organisations and have heightened the debate over how best to deal with this increasing global threat. This has lead the United Nations Security Council to pass a number of resolutions condemning the activities of RAM. The latest resolution follows:

United Nations   S/RES/XXXX (DDDD)

Security Council   Distr.: General

DD-MM-YY
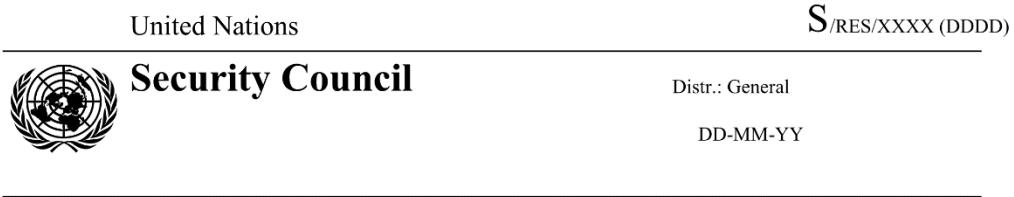
Resolution XXXX (YYYY)

**Adopted by the Security Council at its NNNNth meeting, on
Day Month Year**

The Security Council,

> *Reaffirming* the principles and purposes of the Charter of the United Nations,

Determined to combat by all means threats to international peace and security caused
by terrorist acts,

Recognizing the inherent right of individual or collective self-defence in accordance
with the Charter,

1. *Unequivocally condemns* in the strongest terms the horrifying terrorist attacks
and terrorist activities perpetrated by the Radical Anarchists Movement and *regards* such
acts, like any act of international terrorism, as a threat to international peace and security;

2. *Expresses* its deepest sympathy and condolences to the victims and their families
and to the people and Government of the states affected by these acts;

3. *Calls* on all States to work together urgently to bring to justice the perpetrators,
organizers and sponsors of these terrorist attacks and *stresses* that those responsible for
aiding, supporting or harbouring the perpetrators, organizers and sponsors of these acts will
be held accountable;

4. *Calls also* on the international community to redouble their efforts to prevent and
suppress terrorist acts including by increased cooperation and full implementation of the
relevant international anti-terrorist conventions and Security Council resolutions, in
particular resolution 1269 (1999) of 19 October 1999;

5. *Expresses* its readiness to take all necessary steps to respond to the terrorist
attacks and to combat all forms of terrorism, in accordance with its responsibilities under the
Charter of the United Nations;

6. *Decides* to remain seized of the matter.

With fears mounting that RAM will continue to recruit marginalized individuals to their cause and
expand their network of operations, the Secretary-General of the United Nations has formally
requested support from various organisations including the NATO, the African Union, and the
OGPS. Each organisation is to take a lead role in what is to be a global offensive to counter RAM's
ability to fund activities, recruit members and deploy assets. NATO will take the lead in information
and intelligence gathering and will deploy military assets if and when it is determined that doing
so is required. The OGPS will focus their efforts on establishing a global information platform aimed
at countering the spread of RAM ideology, dispelling the lies published by RAM's propaganda
machine, and significantly reducing their ability to recruit via the internet and other technologies.
Other regional organisations will look at strategies to reduce the marginalization of those
vulnerable to RAM propaganda and will work together to deal with regional economic disparities
which cause financial strife and allow RAM to exploit those in poverty.

The section within the OGPS tasked with establishing the global information platform is the Public Diplomacy and Information Directorate. A recent Assistant Secretary-General (ASG) rotation brought a seasoned media and communications professional to the directorate. Brian Bednařík, a Czech national, recently became the 8th ASG in the organisations history. ASG appointments are highly politicized and occur every three to 9 years. Some ASG's come from private enterprise but most come from the foreign service of member countries. This causes conflicts when politically minded ASG's need to deal with commercially minded ASG's.

One of the first things Brian did, with the assistance of Prabhat Mali, was to implement directorate wide document standards. Previously, there were some standards but no guidelines or common terminology within the organisation causing confusion, frustration, and disagreement over what formats and quality were acceptable. Some of these new changes include:

1. All requests and justifications for spending funds must contain a return on investment analysis and a section describing the management actions and reviews that will be put in place to ensure that the outcomes are achieved and confirm that the benefits are realized. The document should be created using the new document template located in the document management system. The standard name for this document is an "Investment Justification and Measurement"

2. A PDD Knowledge Management Database was created. This database is to be used as a central repository for corporate knowledge. The database needs to be accessible to everyone to read and should be updated on a regular basis as new knowledge is gained. Individual departments or projects should maintain their own secured databases setup by the MIS department. New entries in the individual databases will be uploaded to the corporate database automatically every evening. The individual databases should be named in the following way: "Knowledge Management - <Department or Project Name>"

3. All documents created for internal use must be written in the English language. Small spelling or grammatical errors should be avoided but are acceptable providing the mistakes do not cause misinterpretation or confusion over the meaning of the text

4. All documents created for external distribution must be written in English and cannot contain spelling or grammatical errors that would be detectable by a CEFR level C1 speaker.

Brian also took time to talk to all the people in his directorate to get an idea of how they handled daily operations. Throughout the consultations he asked everyone to reflect upon past experiences and had all the input documented in what he termed as a Knowledge Management Database. This was a completely new concept to the organisation. The following is the contents of this new database. Although not perfect, Brian viewed it as a good start to collecting and tracking corporate experiences.

Corporate Knowledge Management Database

ID	Type	Knowledge Description	Impact	Date logged	Logged by	Status / Action
1	Operations	CNN International is increasing coverage of events happening in Africa.	More information for processing.	DD/MM/YY	Wenzel Thalberg	Looking for ways to use increased info.
2	Suppliers	Print shop Inc. is not reliable. It has been late on every print delivery for the past 14 months.	Bad quality printed materials, with late delivery	DD/MM/YY	Xing Liu Xian	Avoid using if at all possible. Use internal print shop.
3	Technology	New Gigabit satcom uplink has been released and offers much better bandwidth.	Transmit +50TB data per sec.	DD/MM/YY	Silvije Zagorac	Specify new uplink in future projects.
4	Projects	PRINCE2 rarely works without tailoring. The previous projects didn't do this and ended up spending a lot of money creating unnecessary controls that never got used. People got really frustrated.	Failed projects	DD/MM/YY		Make sure to tailor the method to the project environment
5	Outreach	Many of the organisations providing information through outreach Asia have been infiltrated by RAM.	Disinformation is becoming a problem	DD/MM/YY	Anand Patel	Find a way to filter information from Asian contacts.
6	MIS	Backups run during the day take up too much network bandwidth.	Slow application response time.	DD/MM/YY	Régis Pierlot	Don't do backups during the day.
7	Technology usage	RAM is using the internet for 60% of their recruitment activities.	RAM is gaining an internet audience	DD/MM/YY	Sandra Pasteur	Monitor all RAM internet activity
8	Projects	A lack of PRINCE2 training has caused confusion and delays on previous projects that attempted to use the method. People still aren't trained.	Poor performance using PRINCE2	DD/MM/YY	Prabhat Mali	People need to be trained before making them part of the project management team.
9	Suppliers	Zamboni technology s.r.o. is closed for July each year. Check their website in early May to see the exact dates.	Parts needed in August must be ordered in mid-May	DD/MM/YY	Xing Liu Xian	Noted in the procurement system.
10						

He has also been working hard to determine how the organisation can best respond to the UN's request to establish a global information platform. After doing some basic research he has decided that a multiple project approach is the best way forward. The only problem is that there is no project mandate.

1   PRE-PROJECT (MANDATE) – EXERCISE 1

Within the OGPS, like at NATO and the UN, instructions from the Secretary-General to the Assistant Secretaries-General come in the form of a tasker. A tasker is a formal document tasking a division or directorate to perform a set of specified tasks. A tasker is therefore equivalent to a PRINCE2 mandate.

From an organisational perspective, the OGPS, like NATO, has a Private Office. The Private office is the organisation which supports the Secretary-General. It includes administrative assistants and advisors. All taskers are prepared for the Secretary-General by the members of the Private Office.

You have been temporarily assigned to the Private Office and have been requested to create a tasker for the Public Diplomacy Directorate tasking them to establish a global information platform in accordance with the wishes of the UN. Use all the information given in the case to create the tasker, being as complete as possible. The tasker template is located in the IS. The tasker reference number (unique ID) has already been assigned. All other information needs to be completed by your team.

2   STARTING UP A PROJECT (ORGANISATION) - EXERCISE 2

After a week of anticipation, rumours of a new tasking for the directorate from the Private Office have come true. While sitting in a meeting with the ambassador of Iceland, Bednařík's administrative assistant politely interrupted to inform him that the Secretary-General (Sec. Gen.) wished to see him in the Private Office. During his meeting with the Sec. Gen., Bednařík was provided with the UN related tasker and it was agreed that the new global information platform should be developed and deployed using multiple projects. Bednařík wants the projects to be managed using the PRINCE2 method.

Personnel Profiles of Potential Project Personnel

Brian Bednařík, Assistant Secretary General (ASG), Public Diplomacy Directorate

Brian Bednařík, a Czech national, recently became the 8th ASG of the organisation. He has 25 years of achievements as a commercially astute media and communications professional. He understands the technical aspects as well as the collection and dissemination methods involved in the messaging and media industry. He is also well educated in the areas of financial control and the managing of human resources. His cross-functional experience brings breadth to the ASG level and depth to his decision-making ability. He is a multilingual communicator, whose team building skills, strategic vision, and creativity have allowed him to identify and resolve many complex problems. He is particularly known for his proactive application of change and risk management. Before joining the OGPS, he served as the Vice-president of Messaging and Communications for a number of companies in the Czech Republic, Slovakia, and Germany. He also has a degree in mass media and communications from a top ten university in the UK.

Bednařík joined the OGPS because of his desire to make a difference in the world. He spends approximately 25% of his time in the office and the balance attending meetings, speaking at

events, and diplomatic functions. When in the office, he has no time to deal with daily operational tasks, leaving this to his excellent Executive Officer.

Régis Pierlot, Executive Officer (Admin Head)

Régis Pierlot is a young professional and was recently named as the Executive Officer by Brian Bednařík. Pierlot has a master's in business management and has a background in public relations in both the corporate and governmental organisations. He has also worked in a variety of other positions within the mass media and marketing industry including merchandising, marketing, and facilities management. His experience has taught him that hard work always pays off and he knows he will need a strong work ethic to make it as the new Executive Officer. He is thrilled to be part of the OGPS and dreams of one day becoming an ASG in either NATO or the OGPS. He has excellent interpersonal skills and is a true team player and motivator.

Pierlot looks forward to working on new projects for the organisation and wants to learn about PRINCE2.

Ted Bundy, DASG, Media & Communications Programmes

Ted Bundy is a hands-on executive with over 20 years of progressive experience specializing in broadcast and print media. He joined the OGPS shortly before Bednařík. He was hired for his experience executing business strategies in start-up, high growth, turn-around, and established mass media environments.

He has a keen focus on service and operational excellence and continual quality improvement to increase satisfaction and internal efficiency. Bundy has repeated success in partnering with cross-functional teams and personnel at varying levels within organisations to improve service levels, media reach, and information uptake. He is in charge of all media and communications operations for the OGPS.

Mert Kumpe, Broadcast Engineer

Mert Kumpe has been with the organisation for 15 years. He started as a junior technician and has worked his way up to the Senior Broadcast Engineer position. He is in charge of all technical aspects related to broadcasting for the organisation. He is hard working, fast thinking, quick to learn and easily approachable. He has been responsible for ensuring that the organisation implements technology changes in a systematic and cost-effective manner. In doing so he has proven to be an excellent problem solver and analytical thinker. He is a strong communicator who is able to give and receive instructions while also working well in a team approach. He is well respected within the organisation. Kumpe reports to Ottar Jeglum, Media Specialist.

Arjana Owusu, DASG, Outreach Programmes

Arjana Owusu is a business leader with a proven track record of building high performing outreach teams and accelerating information flows between stakeholders. With a strong background in linguistics and translation, she excels at building scalable integrated campaigns that leverage cutting edge communication techniques and networks. Although performance is at the core of who she is, she believes organisations need to tell compelling stories and build relationships based on trust if they want to succeed. She reports directly to the ASG, Brian Bednařík.

Ana Sofía Espinar, Manager, Global Information Delivery

Ana Sofía Espinar started with the organisation as an intern working directly for the office manager, Prabhat Mali. Espinar, under the direction of Silvije Zagorac and Mali, quickly developed a document management and tracking system, designed a set of corporate operational procedures,

and developed and implemented a full set of document templates incorporating the new visual identity guidelines. She has a master's degree from Hanover University in economics and recently passed her PRINCE2 Foundation Exam. During her internship she impressed Ted Bundy and her new boss, Orito Kenko, Director, Print and Internet Group so much that they decided to create the Global Information Delivery Manager position for her. Now, it seems, she will have a much bigger role than anticipated given the new global platform that will be created. She is a very meticulous individual who has a keen focus on quality.

Prabhat Mali, Office Manager

Prabhat Mali is an experienced office manager with over 20 years in general administration and customer service. He has a proven track record of managing teams and achieving excellent results in various industries including commercial printing, contract marketing, consumer research, and industrial sales. He is excellent at engaging stakeholders at all levels of the organisation and the creation of cost effective solutions to support the achievement of the directorate's targets.

Reporting directly to Régis Pierlot, Executive Officer, Mali is responsible for ensuring all administration processes are aligned to the company internal systems and are followed. He manages the day-to-day office duties including HR related matters, Health & Safety Compliance, adherence to the quality management process, and ensures all standard operating procedures are followed by each of the functional groups.

Xing Liu Xian, Controller

Xing Liu Xian has worked for the OGPS for the past year and a half. Prior to starting with the organisation, she worked for 12 years as a chartered accountant, where she witnessed many small and medium sized enterprises struggling to survive. She was hired by the previous ASG to streamline the organisation and implement austerity measures in an effort to stem the trend of annual budget deficits. Her duties revolve around ensuring that the directorate is operating effectively and efficiently while also managing the Accounting Department and monitoring internal controls. She also oversees all procurement and supplier contracting functions. She is an excellent analyst and report writer with a focus on doing more with less. Xing Liu Xian reports directly to Régis Pierlot, Executive Officer.

Public Diplomacy Directorate, OGPS

Organization Table

Executive Team		Executive Assistants
Brian Bednařík (M)	Assistant Secretary General	Executive Assistant, ASG
Régis Pierlot	Executive Officer (Admin Head)	Executive Assistant, DASG -Outreach
Arjana Owusu (F)	DASG, Outreach Programmes	Executive Assistant, DASG - Comms
Ted Bundy (M)	DASG, Media & Communications	

Administration Section

Administration & MIS	Finance
Silvije Zagorac (F), Manager, Computer and Internet Services Computer Analysts (6) Computer Techmicians (3) **Prabhat Mali (M),** Office Manager ▪ Office Coordinator ▪ Computer Services Assistant	**Xing Liu Xian (F)**, Financial Controller ▪ Procurement ▪ Senior Accountant ▪ Administrative Assistant ▪ Budgeting and Audit (2) ▪ Grants and Subsidies (3)

Outreach Section

Country Outreach	Community Outreach	Industry Outreach
Wenzel Thalberg (M), Manager, Country Outreach ▪ Country Specialists (32) ▪ Language Specialists (16) ▪ Social Scientists (5) ▪ Liaison Officers (5)	**Anand Patel (M)**, Manager, Community Outreach ▪ Science Section (8) ▪ Academia Section (10) ▪ Religion Section (8) ▪ Technology Section (15)	**Sandra Pasteur (F)**, Manager, Industry Outreach ▪ Industry Orgs. (16) ▪ NGO Entities (6) ▪ Societies (18) ▪ Energy Sector (2)

Media and Communications Programmes

Broadcast Media	Print and Internet Group	Mobile Communications
Ottar Jeglum (M), Media Specialist ▪ Media Relations Assistant ▪ Programme Coordinator **Broadcasting** **Mert Kumpe (M),** Broadcasting ▪ Administrative Assistant ▪ Broadcast Technicians (7) ▪ Video Journalists (5) ▪ Sound Technicians (3) ▪ Editors (2) ▪ Camera Operators (3) ▪ Grips (4) ▪ Gaffers (3) ▪ Production Services (4)	**Orito Kenko (M)**, Director, Print and Internet Group ▪ Messaging Manager ▪ Admin. Assistants (2) **Ana Sofía Espinar (F)**, Manager, Global Information Delivery ▪ Print Designers (2) ▪ Web Designers (2) ▪ Content Delivery (3) ▪ Bloggers (5) **Josef Blatt (M)**, Manager, Graphic Services ▪ Graphic Designer ▪ Graphics Coordinator	**Elodie Duhaime (F)**, Manager, Mobile Communications ▪ Admin Assistant ▪ Content Developers (12) ▪ SatCom Specialists (2) ▪ Terrestrial Specialists (6) ▪ Mobile App Developers (2) ▪ Industry Liaison Officer

In reviewing the details from the tasker, Bednařík has concluded that, once operational, the global information platform would become part of the normal operations of the Media and Communications Programmes overseen by Ted Bundy. Bundy would have the responsibility of implementing, operating and maintaining the new capability. Funding of the Project would also be his responsibility and would be taken from his budget.

One of the major issues that faces Bednařík and the use of PRINCE2 is that many in the organisation do not understand the methodology while others feel it is too bureaucratic. Past attempts to run projects using the method failed due to a lack of tailoring and poor understanding of the method. Xing Liu Xian, the financial controller, has been very outspoken on the topic and wants nothing to do with PRINCE2. She sees it as a complete waste of money and time and believes its only purpose is to generate revenue for the UK government to fund its BREXIT activities.

It has been envisioned that the new capability will be developed through a number of projects. The first project will focus on delivering a "Global Information Platform Strategy". This strategy would define the new capability in finite terms and once accepted by the UN would be used to build the capability and make it operational. The Strategy Project would be run in four stages:

STAGE 1: Information and Communications Requirements Definition.

This stage would be focused on gathering global demographic data, defining target groups for information, and determining the best modes of information delivery.

STAGE 2: New Platform Design and Technology Specifications.

Once the information and communications requirements have been defined specifications will be created for all of the technology required to deliver the new capability. A comprehensive search for high potential suppliers will be undertaken and a list of possible vendors will be created for the international call for bid.

STAGE 3: International Call for Bid.

Vendors from the list created in Stage 2 will be contacted and requested to submit pricing proposals and will be interviewed regarding a long-term international maintenance relationship. Once the search is completed, a shortlist of venders will be created along with their pricing and maintenance proposals.

Based on the results from Stage 1 through 3 a comprehensive value chain analysis will be undertaken. The value chains will be analysed for suitability based on the various research findings.

STAGE 4: Global Information Platform Strategy Creation.

Using all of the information and reports generated in all of the previous Stages, a new, comprehensive strategy will be written.

Exercise:

Using the information in the scenario found in the case plus the information above, fill out the tables and answer the questions found in sections **2.1 to 2.7** below. Be sure to indicate why these people are suitable for the roles. Include any assumptions and constraints.

2.1   Executive and Project Manager Possible Choices

Position	Name and Title	Reasoning and Constraints
Executive (Choice 1)		

Position	Name and Title	Reasoning and Constraints
Executive (Choice 2)		

2.2   Project Manager Possible Choices

Position	Name and Title	Reasoning and Constraints
Project Manager (Choice 1)		
Project Manager (Choice 2)		

Once you have completed the tables above, answer the following questions:

1. What role is responsible for appointing the executive and the project manager?

    a. Executive: _____

    b. Project Manager: _____

Wait for the instructor to review the answers before moving on to the next section.

2.3   Senior User and Senior Supplier Possible Choices

Senior User (Choice 1)		
Senior User (Choice 2)		
Senior Supplier (Choice 1)		
Senior Supplier (Choice 2)		

2.4   Project Assurance Possible Choices

Position	Name and Title	Reasoning and Constraints
Business Assurance		
User Assurance		

Position	Name and Title	Reasoning and Constraints
Supplier Assurance		

2.5   Change Authority Possible Choices

Position	Name and Title	Reasoning and Constraints
Business Representative		
User Representative		
Supplier Representative		

2.6   Team Managers

Position	Name and Title	Reasoning and Constraints
STAGE 1: Brand Recognition Merchandise Preference Survey and Conclusions.		

Position	Name and Title	Reasoning and Constraints
STAGE 2: New Merchandise Product Specifications.		
STAGE 3: Supply and Distribution Chain Strategies.		
STAGE 4: Merchandise Strategy Creation.		

2.7   Other Roles

Position	Name and Title	Reasoning and Constraints
Project Support		

Position	Name and Title	Reasoning and Constraints
Quality Assurance		
Quality Assurance		

Please answer the following questions.

What PRINCE2 Principle is being supported by carrying out these activities during the starting up a project process?

_____

_____

_____

What PRINCE2 theme is being supported by carrying out these activities during the starting up a project process?

_____

_____

_____

What role(s) is/are responsible for this activity and why?

_____

_____

_____

3   STARTING UP A PROJECT (LESSONS LEARNED) - EXERCISE 3

Using information from the Corporate Knowledge Management database, document in the table below, the ID numbers of any lessons that should be transferred to the project's Knowledge Management database and justify your reasoning. Then answer the questions after the table.

CKMD ID #	Justification

Please answer the following questions.

What PRINCE2 Principle is being supported by capturing information from the corporate database and why?

_____

The project manager has named the project's database as: Knowledge Management – Merchandising Strategy". Which principle is being applied and why?

_____

4   INITIATING A PROJECT - EXERCISE 4

The purpose of this exercise is to reinforce your understanding of the activities undertaken during the Initiation Stage and the management products created. The goal is for you to complete the activities tables using the items on the lists.

Start the exercise by sequencing the activities and numbering them in order of execution.

Next, fill out the missing information in the spaces provided for **Process, Inputs, Outputs**, and **Approved by** using the list found at the end of the exercise in the Seminar Exercise Book.

As you use an item cross it off the list as each item should only be used once.

Exercise 4, Explained

Activity	Process	Products	Approved by
Prepare the Risk Management Approach ACTIVITY NUMBER:_____		**Inputs**	
		Daily Log	
		Outputs	**Approved by**
		Risk Management Approach	
			Project Manager

Step 1: Sequence the activities and assign a number

Step 3: Create the Outputs

Step 2: Fill in the Columns

Exercise 4, Step 1: Sequence the activities and assign a number

Activity	Process	Products	Approved by
Prepare the Risk Management Approach ACTIVITY NUMBER:___2___		**Inputs**	
		Daily Log	
		Outputs	**Approved by**
		Risk Management Approach	
			Project Manager

Step 2: Fill-in the columns

Process	Inputs	Outputs	Approved by
Directing a Project	Benefits Review Plan	Approved Benefits Review Plan	Project Manager
Initiating a Project	Communication Management Approach	Approved Stage Plan	Project Manager
~~Initiating a Project~~	Communication Management Approach	Benefits Review Plan	Project Manager
Initiating a Project	Configuration Item Records	Configuration Item Records	Project Manager
Initiating a Project	Change Control Approach	Change Control Approach	Executive, Senior User, Senior Supplier
Initiating a Project	Change Control Approach	Issue Register	~~Executive, Senior User, Senior Supplier~~
Managing a Stage Boundary	Daily Log	Product Descriptions	Executive, Senior User, Senior Supplier
	Issue Register	Project Plan, Product Descriptions	Executive, Senior User, Senior Supplier
	~~Lessons Log~~	Quality Management Approach	Executive, Senior User, Senior Supplier

Activity	Process	Products	Approved by
Prepare the Risk Management Approach ACTIVITY NUMBER: 2	Initiating a Project	**Inputs** Risk Register Project Brief Lessons Log Daily Log	
		Outputs	**Approved by**
		Risk Management Approach	Executive, Senior User, Senior Supplier
		Risk Register	Project Manager

Activity	Process	Products		Approved by
Prepare the Risk Management Approach ACTIVITY NUMBER:_____		**Inputs**		
		Daily Log		
		Outputs		**Approved by**
		Risk Management Approach		
				Project Manager

Activity	Process	Products		Approved by
Agree the tailoring requirements ACTIVITY NUMBER:_____	Initiating a Project	**Inputs**		
		Lessons Log		
		Outputs		**Approved by**
		Defined tailoring and tailored controls		Executive, Senior User, Senior Supplier

Activity	Process	Products		Approved by
Prepare the Change Control Approach ACTIVITY NUMBER:_____	Initiating a Project	**Inputs**		
		Project Brief		
		Outputs		**Approved by**
				Executive, Senior User, Senior Supplier
		Updated Team Structure		

Activity	Process	Products	Approved by
Prepare the Quality Management Approach ACTIVITY NUMBER:_____		**Inputs**	
		Lessons Log	
		Outputs	**Approved by**

Activity	Process	Products		Approved by
Prepare the Communication Management Approach ACTIVITY NUMBER:_____	Initiating a Project	**Inputs**		
		Project Brief		
		Lessons Log		
		Issue Register		
		Change Control Approach		
		Outputs		**Approved by**
		Communication Management Approach		

Activity	Process	Products	Approved by
Set up project controls ACTIVITY NUMBER:_____		**Inputs**	
		Project Brief	
		Lessons Log	
		Outputs	**Approved by**
		Project Controls	Executive, Senior User, Senior Supplier
			Executive, Senior User, Senior Supplier
			Executive, Senior User, Senior Supplier

Activity	Process	Products	Approved by
Create the Project Plan ACTIVITY NUMBER:_____		**Inputs**	
		Lessons Log	
		Risk Register	
		Issue Register	
		Risk Management Approach	
		Quality Management Approach	
		Outputs	**Approved by**
			Executive, Senior User, Senior Supplier
			Executive, Senior User, Senior Supplier
		Updated Role Descriptions	
		Updated Configuration Item Records	
			Executive, Senior User, Senior Supplier

Activity	Process	Products		Approved by
Refine the Business Case ACTIVITY NUMBER:_____	Initiating a Project	**Inputs**		
		Project Brief - Outline Business Case		
		Outputs		**Approved by**
				Executive, Senior User, Senior Supplier
		Detailed Business Case		

Activity	Process	Products	Approved by
Assemble the Project Initiation Documentation ACTIVITY NUMBER:_____		**Inputs**	
		Detailed Business Case	
		Team Structure	
		Role Descriptions	
		Quality Management Approach	
		Change Control Approach	
		Risk Management Approach	
		Communication Management Approach	
		Project Plan	
		Outputs	**Approved by**
		Project Initiation Documentation	Executive, Senior User, Senior Supplier

Activity	Process	Products		Approved by
Plan the Next Stage ACTIVITY NUMBER:_____		**Inputs**		
		Project Initiation Documentation		
		Lessons Log		
		Risk Register		
		Issue Register		
		Outputs		**Approved by**
				Executive, Senior User, Senior Supplier
				Executive, Senior User, Senior Supplier
		Updated Risk Register		
		Updated Issue Register		

Activity	Process	Products		Approved by
Authorising a Stage

ACTIVITY NUMBER:_____ | | **Inputs** | | |
		Project Initiation Documentation		
		Outputs		**Approved by**
		Approved PID		
				Executive, Senior User, Senior Supplier
				Executive, Senior User, Senior Supplier

Initiation Stage Activities Table (Selection Sheet)

Process	Inputs	Outputs	Approved by
Directing a Project	Benefits Management Approach	Approved Benefits Management Approach	Project Manager
Initiating a Project	Communication Management Approach	Approved Stage Plan	Project Manager
Initiating a Project	Communication Management Approach	Benefits Management Approach	Project Manager
Initiating a Project	Configuration Item Records	Configuration Item Records	Project Manager
Initiating a Project	Change Control Approach	Change Control Approach	Executive, Senior User, Senior Supplier
Initiating a Project	Change Control Approach	Issue Register	Executive, Senior User, Senior Supplier
Managing a Stage Boundary	Daily Log	Product Descriptions	Executive, Senior User, Senior Supplier
	Issue Register	Project Plan, Product Descriptions	Executive, Senior User, Senior Supplier
	Lessons Log	Quality Management Approach	Executive, Senior User, Senior Supplier
	Lessons Log	Quality Register	Executive, Senior User, Senior Supplier
	Project Brief	Risk Register	
	Project Brief	Updated Role Descriptions	
	Project Brief - Project Definition, Project Approach	Updated Role Descriptions	
	Project Brief - Project Product Desc.	Updated Team Structure	

	Project Brief - Project Product Desc., Project Approach	Updated Team Structure
	Project Controls	
	Project Controls	
	Project Plan	
	Project Plan	
	Quality Management Approach	
	Quality Management Approach	
	Risk Management Approach	
	Risk Management Approach	
	Risk Register	
	Risk Register	
	Stage Plan	
	Stage Plan, Product Descriptions	
	Tailoring of PRINCE2	
	Updated Project Initiation Documentation	
	Updated Quality Register	