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"PM2 by European Commission. Open, free and common project management framework for all European institutions, companies and citizens. – PM2EU+"

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WHITE PAPER

Project Management: The importance of the initiating and closing phases.

Dealing with a certain activity includes bearing in mind which aspects are essential for reaching the success.

The first and most obvious question, although sometimes poorly answered, is to know if we are really dealing with a project. Projects are often confused with mere processes. On other occasions, projects are mistaken for programmes, since what we really want to manage is a set of projects, related to each other, but which need an approach that is more aligned with programme management.

Another fundamental aspect is that, once a project has been identified, it must be managed as such from the very beginning. There are many occasions in which projects start to be managed under the project management framework in the planning phase and even in the execution phase.

Starting to manage projects from the early stages (initiation stage according to the PM2 methodology, pre-project activities according to the international standard ISO 21502:2020), allows to know from the beginning the main determinants of project success, both in terms of factors and those criteria that can be established to measure the achievement of the project throughout its life cycle.

The relationship of the risks and impact on the project with the project timeline is well known (see figure 1).
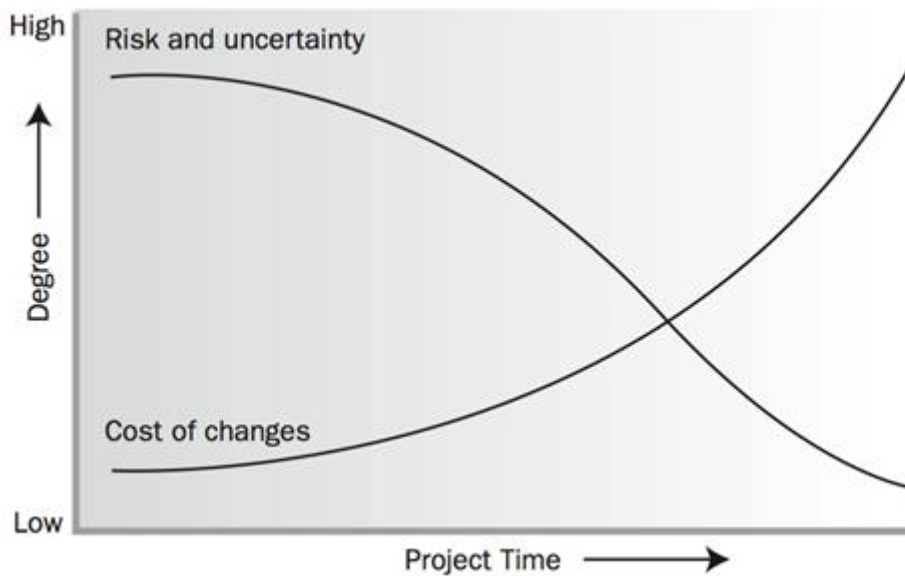
Figure 1: Project timeline, risk and cost of changes. (Project Management Institute, 2017)

Any small deviations in the objectives in the early stages of the project, if not corrected, increase exponentially as time goes by and then their adjustment requires a great deal of resources and time.

Dedicating qualified time and resources in the start-up phase of the project results in the best possible conditions for the initiation of the project. This is why successful organisations dedicate the most qualified people to project initiation. It is a good practice that, during this phase, senior and experienced project managers share responsibilities with less experienced project managers. This way of working results in the growth and learning of the company's teams, building on the expertise right from the start.

Project management practitioners and organisations are traditionally committed to not economising on resources in the core phases of the project lifecycle (planning and execution phases).

In many occasions, problems start to occur when the project enters the closing phase.

This is because, at this stage, in view of the low percentage of pending work with respect to the total (see figure 2), organisations start to release resources, often leaving the project under-resourced for its optimal conclusion.
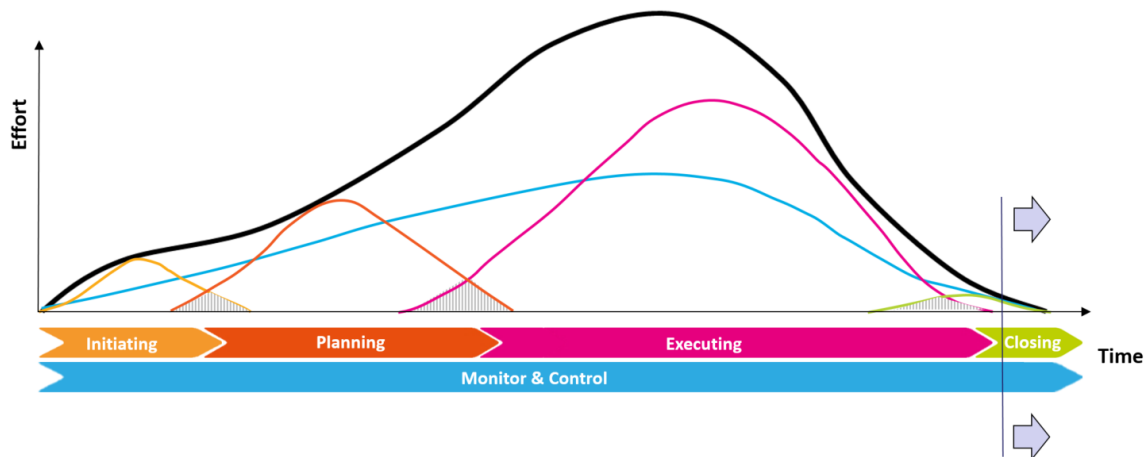
Figure 2: Project Life Cycle (PM2 proposal) (DIGIT – EC, 2018).

Currently, the so-called golden triangle of project management (success based on the exclusive achievement of objectives in terms of scope, cost and time within minimum quality standards accepted by the client) has been overtaken by a much more holistic view of the role of projects in organisations.
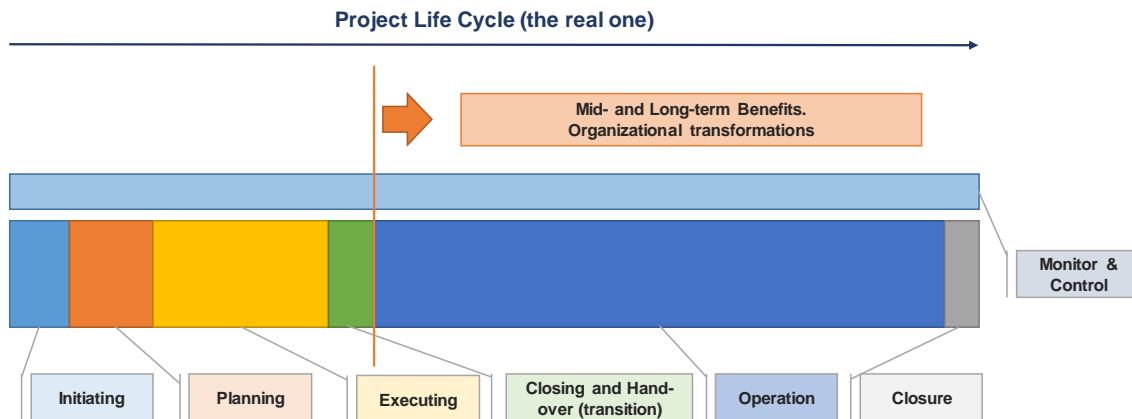
Today, we are also interested in the transformation, impact and improvement capacity of projects in organisations and in the largest possible number of stakeholders. We are therefore talking not only about short-term projects (deliverables), but also about mid- and long-term projects (benefits).

To this purpose, it is essential for project managers to have a project life cycle in mind, which includes the transition and start-up of project deliverables, as well as their exploitation for the previously defined period. Monitoring and control during this operational phase is essential to ensure decision-making that optimises long-term benefits (see figure 3).

This statement, simple to point out, is not easy to implement. The reason is that project teams persist until the final delivery of the project and sometimes during a service release (warranty) period. Thereafter, it is the end-users and support staff who manage the day-to-day running of the project deliverables (correctly or not).

It is good practice, although not widely used, to carry out monitoring and control during this stage in a structured and systematic way. This mainly involves two actions:

- Making decisions to ensure that the medium and long-term benefits of the project are maximised for the organisation and its stakeholders.
- Documenting and reporting those aspects learned from during the exploitation phase, in terms of lessons learned (what we should repeat and what we should avoid in the future). This log is essential and should be integrated into the cycle of new projects (release and initiation phase).

Project Life Cycle (the real one)

Mid- and Long-term Benefits.
Organizational transformations

Initiating | Planning | Executing | Closing and Hand-over (transition) | Operation | Closure

Monitor & Control

* Between phases overlaps are possible.

** Lessons learned will be present over the whole Project Life Cycle.

Figure 3: Project Life Cycle - the real one. (Authors)

This figure is what gives sense to the title of these reflections. Any project management methodology must take into account this project life cycle (the real one), even if its proposal is limited to a methodological proposal for the initiating, planning, executing and closing phases and their monitoring and control.

Drawing the project life cycle including the exploitation phase allows project managers to see the importance of the whole time line[1]. It will do possible to make the most and the achievement of mid and long-term benefits for the organisation and its stakeholders.

Anyway, the presented fact is a cultural transformation in the way of approaching project management, assuming its capacity to improve organisations and add benefits beyond the business scope. It is necessary to understand and interiorise that each project is an opportunity for improving based on its results and its impact at all levels.

This project management culture is essential for organisations and from the appropriate decision-making levels. However, we cannot forget that behind each level there are people, concluding with what we must always bear in mind: project management is how people manage projects. People matter.

Acknowledgements

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[1] In order to avoid misunderstandings, the authors have used different terms to refer to the stage at which the project deliverables are completed and the transition to the results exploitation phase (closing phase) and the point at which the deliverables' life cycle ends (closure step).

References

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