

## Delivering a Work Package with PRINCE2®

### The role of the Team Manager.

#### Introduction

As Team Manager, your prime responsibility is to produce the defined products to an appropriate quality level, in a set timescale and at a cost that is acceptable to the Project Board. You report to, and take direction from the Project Manager. This quick reference card provides you with the role of the Team Manager in projects.

Note: do not confuse this *project role* with a “team” manager *organizational function* playing a hierarchical role in the organisation, such as a division or department manager. This aspect is briefly touched in the last section of this quick reference card.

#### PRINCE2® Principles

- Continued Business Justification
- Learn from experience
- Defined roles and responsibilities
- Manage by stages
- Manage by exception
- Focus on products
- Tailor to suit the project environment

#### Key responsibilities

- Prepare a team plan, including a schedule, for each work package and agree it with the project manager
- Produce products consistent with their product descriptions
- Manage your project team members
- Ensure the quality activities relating to the team’s work are planned and performed correctly, and are within tolerance
- Take responsibility for the progress of the team’s work and use of team resources, and take corrective action where necessary, within the constraints agreed with the project manager
- Produce checkpoint reports to inform the project manager about the work package status
- Notify the project manager by raising an issue if forecasts indicate that an agreed and assigned work package may exceed tolerances
- Assist the project manager in examining issues and risks
- Manage specific issues and risks as directed by the project manager
- Pass back to the project manager products that have been completed and approved in line with the agreed work package

#### Key Products

##### Specialist Products

- Produce the products, that are part of the assigned work package, according to their product description

##### Work Package

Your key input, it authorizes you to start the work. It can be very formal (e.g. a contract) or informal (e.g. an e-mail). Review its contents and give your commitment to produce the products. It should contain:

- Date of the agreement and the team/person with whom agreement is made
- A description of the work to be done, including references to product descriptions
- Agreement on cost, time, scope, risk, and the related tolerances
- Any constraints and techniques, processes and procedures to be used
- Reporting, problem handling and escalation procedures
- Approval method

##### Team Plan



#### Delivering QRC v01.pub

- Your basis for managing your team and controlling your team.
- PRINCE2® does not prescribe any format or composition. It is considered best practice by the author that the plan contains at least the products to develop, any external dependencies, the budget

##### Checkpoint Report

Produce this report according to the agreement of the work package, to provide the project manager with an accurate status of a work package. It should contain:

- Products being developed, products completed, products planned
- Quality activities performed and planned
- Tolerance status, lessons identified, and issues and risks

##### Issue Report

- As soon as you forecast that the work package will deviate outside one or more of the work package tolerances, report this to the project manager using an issue

##### Registers, Logs and Records

- Maintain the quality, issue, and risk register, and the configuration item records

#### The Project Lifecycle



The project lifecycle contains a number of distinct phases. As a Team Manager within a project you will mainly be active in the development stages, i.e. after Initiating a Project. The role you can play in the different parts of the project lifecycle is explained below.

##### Starting Up a Project

During starting up a project, the minimum is done in order to allow the project board to decide if the project is worthwhile to initiate. The project management team is designed and appointed. At this point you might already be contacted to discuss your role within the project. Confirm your availability, make sure you understand your role in the project, and give your commitment.

##### Initiation

Initiation is important to enable the organisation to understand the work that needs to be done. An important aspect of this is the planning exercise. As Team Manager—if already appointed during starting up—you can support the project manager during the development of the project plan: defining products, identifying activities and dependencies, preparing estimates, identifying risks, providing input for the different strategies of quality, risk, configuration management, and communication, etc.

##### Stages

During the different stages, the project’s products are developed. The project manager authorizes a work package to the Team Manager so the work can start. It is up to the Team Manager to accept, execute, and deliver the work package. This is detailed at the back of this reference card.

##### Closing

As part of the last stage, user acceptance of the project’s products is verified, and the performance of the project is reviewed against the initial baselines. As Team Manager you can support the project manager with the project performance evaluation.

## Managing Product Delivery—during each stage

In the project lifecycle, as a Team Manager, you are responsible for developing the specialist products during the different stages. In general the process for the Team manager — often referred to as Managing Product Delivery — contains three activities:

- Accept a Work Package
- Execute a Work Package
- Deliver a Work Package

These activities are detailed below.

### Accept a work package

Before a work package is allocated to a team there should be agreement between the project manager and the team (manager) as to what is to be delivered, the reporting requirements, what constraints apply, any procedures to be applied, and whether the requirements of the work package are reasonable and can be applied. This includes the following activities:

- Review the work package
  - Obtain any referenced documentation
  - Clarify with the project manager *what* is to be delivered
  - Negotiate with the project manager on behalf of the team the constraints within which the work is to be done
  - Agree on work package tolerances
- Understand the reporting requirements: the regular reporting using checkpoint reports, and the reporting of deviations using issue reports
- Understand how, and from whom approval for the products is to be obtained
- Understand to who, and how the approved products are to be formally handed over
- Confirm how to inform the project manager about completion of the work package
- Produce a team plan
  - Consult with project assurance that the Team Plan is viable and in accordance with relevant supplier standards
  - Seek necessary approval for the team plan

Note: In the interest of both the project and the team, develop the Team Plan in parallel with the project manager creating the Stage Plan.

- Review the risks against the team plan and advise the project manager of any significant risks that might impact the stage or project.

### Accept a work package (continued...)

- Consult with project assurance as to whether specific or extra reviewers are required to provide confidence in the quality of the products
- Ensure the quality register is updated with any specific quality activities and when these are planned to be performed
- Finally, agree to deliver the work package

### Execute a work package

Once a work package is agreed, it's time to execute the work to deliver the products that are part of the work package. As a Team Manager, you manage these development activities by doing the following activities:

- Manage the development of the required products according to the work package
  - Develop the products to the quality criteria defined in the product description(s)
  - Ensure the work is conducted in accordance with the required techniques, processes and procedures
  - Maintain the development and operational and support interfaces
  - Follow the procedure to update the quality register
  - Capture and record the effort expended in the Team Plan
  - Monitor and control any issues and risks and advise the project mngnr of their status
- Do not exceed work package tolerances; for any forecast that one or more tolerances will be exceeded, raise an issue to the project manager
- Notify the project manager of any new issues risks or lessons
- Obtain approvals for completed products
  - Follow the method of obtaining and issuing approval records
  - Follow the procedure to update the configuration item records
- Review and report the status of the work package to the project manager
  - Determine the status of each product in the work package
  - Update the team plan—if necessary consult with project assurance regarding its viability
  - Feed the progress information back to the project manager using a checkpoint report in the manner and at the frequency defined in the work package

Note: as Team Manager from the supplier side within the project, there will also be a reporting line to the senior user from the project board.

### Deliver a Work Package

A work package is only finished when all products are correctly approved as stated in the agreed work package, and when the project manager is notified of its completion.

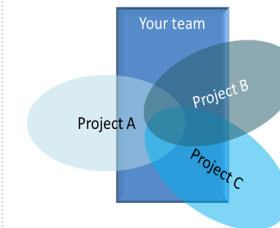
The following activities are to be performed:

- Review the quality register to verify that all the quality activities associated with the work package are successfully completed
- Review the approval records to verify that all the products to be delivered by the work package are approved as agreed in the work package
- Update the team plan to show that the work package is complete and that the assigned resources are available for other work-package (from this or other projects)
- Follow the procedure to deliver the completed products as agreed in the work package
- Notify the project manager that the work package is complete

## Team manager, as a function...

What if your *function* description says you are a *team manager*, i.e. not for a specific project, but in general: you are assigned a permanent role to manage a permanent team (remember: projects are temporary!).

For example, you are promoted to manager of the web-development-team, and project managers from business lines will come to you for developing new web-functionalities or making some improvements, or ...



- Next to your responsibilities as a functional manager you will now get requests for project resources and will have to do resource management
- Without an overview of the current and already reserved resources for other projects there is no way of being able to agree on such resource re-

quests

- Solution: have 1 team plan which includes all agreed Work Packages for all projects to the level of detail as needed for your responsibilities as a functional manager.

Note: this is NOT a PRINCE2® concept, but is considered best practice by the author *if* this fits the organizational context.