

FROM PRINCE2® 2005 TO 2009



REFERENCE MANUALS

The 2009 Refresh has brought about two new reference manuals:

1. **Managing Successful Projects with PRINCE2®** is written for those who manage or assist in the management of projects – Project Managers, Team Managers, support staff and team members.
2. **Directing Successful Projects with PRINCE2®** is written for those who direct or assist with directing projects – Project Board members, Programme Managers and those in assurance roles.

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COMPARISON OF THE 2005 AND THE 2009 VERSIONS OF **MANAGING SUCCESSFUL PROJECTS WITH PRINCE2®**

Area	2005	2009
Language used	English.	International English.
Principles	None	Seven Principles
		1. Continued business justification
		2. Learn from experience
		3. Defined roles and responsibilities
		4. Manage by stages
		5. Manage by exception
		6. Focus on products
		7. Tailor to suit the project environment – The Project Initiation Documentation should state how the PRINCE2 method is being tailored for the project
Themes/Components	Eight Components	Seven Themes
	1. Business Case	1. Business Case
	2. Organisation	2. Organization
	3. Plans	3. Plans
	4. Management of Risk	4. Risk (major re-write)
	5. Controls	5. Progress
	6. Quality in a Project Environment	6. Quality (significant re-write)
	7. Change Control)	7. Changes
	8. Configuration)	
	Management)	

Area	2005	2009
Processes	Eight Processes with subprocesses	Seven Processes with activities
	1. Starting up a Project	1. Starting up a Project
	2. Directing a Project	2. Directing a Project
	3. Initiating a Project	3. Initiating a Project
	4. Controlling a Stage	4. Controlling a Stage
	5. Managing Stage Boundaries	5. Managing a Stage Boundary
	6. Managing Product Delivery	6. Managing Product Delivery
	7. Closing a Project	7. Closing a Project
8. Planning	<i>The subprocesses from Planning are now included as activities in the Plans theme. The Plans theme is the only theme which has prescribed activities. It also includes the activity that triggers Product-based Planning.</i>	
	45 subprocesses.	40 activities in the Processes plus 7 activities in the Plans theme.
	The subprocesses have codes	All codes have been removed. This may present communication issues for implementation and use of the methodology
Techniques	Three Techniques detailed	Two Techniques detailed
	1. Product-based Planning – mandatory. Very prescriptive guidance.	1. Product-based Planning – mandatory. Much less prescriptive as rules have been relaxed. Guidance not as detailed.
	2. Quality Review – optional. Highly detailed.	2. Quality Review – optional. Not as detailed.
	3. Change control – optional.	
Guidance on Embedding PRINCE2 – Done by the organization to adopt PRINCE2	None.	Focus on embedding PRINCE2 through: <ul style="list-style-type: none"> • Process responsibilities • Scaling rules/guidance • Standards (templates/definitions) • Training and development • Integration with business processes • Tools • Process assurance
Guidance on Tailoring PRINCE2 – Done by the project management team	Some guidance on scalability.	Focus on tailoring through: <ul style="list-style-type: none"> • Adapting the themes (through strategies and controls)

Area	2005	2009
to adapt the method to the context of a specific project		<ul style="list-style-type: none"> • Incorporating specific terms/language • Revising the Product Descriptions for the management products • Revising the role descriptions for the PRINCE2 project roles • Adjusting the processes to match the above
Management Products	<p>36 management products</p> <p>Are documents</p>	<p>26 management products with guidance on their evolution and which ones can be combined. All Product Descriptions have been modified.</p> <p>Are now information sets used by the PRINCE2 processes so that certain roles can take action and/or make decisions.</p> <p>The following Product Description outlines have been removed.</p> <ol style="list-style-type: none"> 1. Acceptance Criteria – Now in the Project Product Description rather than the Project Quality Plan 2. Customer's Quality Expectations – Now in the Project Product Description rather than the Project Quality Plan 3. Exception Plan – One Product Description for all Plans 4. Follow-on Action Recommendations – Included in the End Project and End Stage Reports 5. Off-Specification – Now in the Issue Report 6. Product Breakdown Structure – No longer a defined management product 7. Product Checklist – Optional part of a plan – could replace the schedule. 8. Product Flow Diagram – Not a defined management product. 9. Project Approach – Part of the Project Brief and the Project Initiation Documentation. 10. Project Mandate – Not a defined management product. 11. Request for Change – Covered by

Area	2005	2009
		the Issue Report. 12. Stage Plan – Covered by the Product Description for Plans.
		There are four new management products: 1. Benefits Review Plan 2. Issue Report 3. Project Product Description 4. Risk Management Strategy
Baseline management products are those that define aspects of the project and, once approved, are subject to change control	Not applicable	1. Benefits Review Plan 2. Business Case 3. Communication Management Strategy 4. Configuration Management Strategy 5. Plan (covers Project, Stage and Team Plans) 6. Product Descriptions 7. Project Brief 8. Project Initiation Documentation 9. Project Product Description 10. Quality Management Strategy 11. Risk Management Strategy 12. Work Package
Records – dynamic management products that maintain information regarding project progress	Not applicable	1. Configuration Item Records 2. Daily Log 3. Issue Register 4. Lessons Log 5. Quality Register 6. Risk Register
Reports – management products providing a snapshot of the status of certain aspects of the project	Not applicable	1. Checkpoint Report 2. End Project Report 3. End Stage Report 4. Exception Report 5. Highlight Report 6. Issue Report 7. Lessons Report 8. Product Status Account
Appendices	Risk Categories	Removed
	PRINCE2 Health-check	PRINCE2 Health check
	Project Document Management	Removed
		Governance appendix added
		Product-based planning examples

PRODUCT DESCRIPTION OUTLINES THAT HAVE BEEN CHANGED

Management Product	Change
Benefits Review Plan	Previously the Post-Project Review Plan, the name change reflects the purpose of this plan. The plan is now created during the Initiating a Project process and is reviewed and updated at the end of each stage and at the end of the project. The composition has been expanded to include the scope of the plan, accountability for the benefits and baseline measures for each benefit
Business Case	The composition has been expanded to include an executive summary, and any expected dis-benefits. The evaluation section has been removed
Checkpoint Report	The frequency is now as defined by the Work Package (only). The composition has been improved to more clearly distinguish between this reporting period and the next reporting period, it also now includes lessons identified, but references to activities have been removed (the focus now being on products and quality management activities)
Communication Management Strategy	Previously the Communication Plan, it is now made clear that this covers communications to parties both internal and external to the project and that the flow of information should be bi-directional. The composition has been significantly expanded to reflect that it is now a strategy and not a plan
Configuration Item Record	The record now refers to item rather than product in line with the Change theme. Also, a few additional headings have been included to align the records better to the Product Status Account, these are item identifier, item attribute, product state and variant
Configuration Management Strategy	Previously the Configuration Management Plan within the Project Quality Plan, it is now made clear that this strategy covers both the configuration management and the issue and change control procedures. The composition has been significantly expanded to reflect that it is now a strategy and not a plan
Daily Log	The purpose of this log has now been expanded to cover the recording of any issues that have been managed informally by the Project Manager. The composition has been slightly changed to cover problems and events as well as actions or comments
End Project Report	Most noticeably, the report now includes a Project Manager's report to summarize the project's performance, and incorporates a lessons report and follow-on action recommendations, (although the Lessons Report has been retained as a separate management product). Also, the titles of the sections have been improved to cover the reviews of the Business Case, project objectives, team performance and products

Management Product	Change
End Stage Report	Similarly, this report now includes a Project Manager's report to summarize the stage performance, and incorporates a lessons report and follow-on action recommendations. Also, the titles of the sections have been improved to cover the reviews of the Business Case, project objectives, stage objectives, team performance and products, issues and risks, and the Project Manager's forecast for the project and next stage
Exception Report	Now only produced by the Project Manager, the composition has been expanded to include an exception title, consequences to both the project and to corporate or programme management, and a lessons report
Highlight Report	The composition has been improved to more clearly distinguish between this reporting period and the next reporting period. It also now refers to Work Packages (as well as to Products), corrective actions, and requests for change, and it includes a status summary and a lessons report
Issue Register	Previously the Issue Log, the issue types are now request for change, off-specification or problem/concern and new sections have been added for severity and closure date
Issue Report	Previously Project Issue, this report is now created for all issues that need to be handled formally. The composition has been expanded to include issue type, recommendation, severity, approved by and closure date
Lessons Log	Previously the Lessons Learned Log, the purpose of this log has been expanded to cover lessons that apply to this project and not just those that apply to other projects. It is now created during the Starting up a Project process in order to capture lesson from previous similar projects that apply to this project. The composition has been reformatted to cover lesson type, lesson detail, logged by, date logged and priority
Lessons Report	Previously the Lessons Learned Report, this report is still used to pass on any lessons that can be usefully applied to other projects, however, reference is now made to the fact that this report can be created at any time. The composition has been reformatted to cover executive summary, scope of report, review of what went well or badly with recommendations, review of useful measures, and additional information for each significant lesson
Plan	Previously Project Plan, Stage Plan or Exception Plan, there is now one Product Description outline for Project, Stage, Team, and Exception Plans. Compared to the previous Project Plan outline, greater emphasis has been given to budgets, tolerances, Product Descriptions and schedule, and new sections have been added for lessons incorporated and monitoring and control

Management Product	Change
Product Description	The allocated to section has been removed, but new sections have been added for development skills required, and quality responsibilities (to define the producer, reviewer(s) and approver(s) for the product)
Product Status Account	The composition has been reformatted into three sections, report scope, date produced and product status (within which are listed the type of information that may be included in the report)
Project Brief	The composition has been significantly expanded to now incorporate the Project Product Description (which includes the customer's quality expectations and the acceptance criteria), project approach, project management team structure, roles descriptions and any references to other documents. The project definition sections has also been expanded to include the background, assumptions and the user(s) and other known interested parties
Project Initiation Documentation	Previously the Project Initiation Document, the change of name emphasising that it is usually made up of a number of component products. A new purpose has been added, "a single source of reference about the project". The distinction between stable and dynamic has been removed, but it is still recognized that the PID is a living product. The composition is broadly the same except that it now contains the four strategies, a section to describe the tailoring of PRINCE2, the project controls now only summarises the project level controls and there is no longer a reference to the Risk Register
Project Product Description	This new product replaces the Product Description of the final product. It has a similar composition to a normal Product Description, but the quality sections refer to customer's quality expectations, acceptance criteria with project level quality tolerances, acceptance method and acceptance responsibilities
Quality Management Strategy	Previously the Project Quality Plan, this no longer refers to the customer's quality expectations, quality tolerances, acceptance criteria or quality responsibilities. (See the Project Product Description for quality of the final deliverable, ie the customer's quality expectations, acceptance criteria, quality tolerances, etc.) The composition has been significantly expanded to reflect that it is now a strategy and not a plan
Quality Register	Previously the Quality Log, the composition is broadly unchanged except that references are now included to quality related documentation and records
Risk Management Strategy	This new product describes the specific risk management techniques and standards to be applied and the responsibilities for achieving an effective risk management procedure
Risk Register	Previously the Risk Log, the composition has been changed to reflect the risk management procedure described in the Risk theme

Management Product	Change
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Work Package	
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	The composition is almost identical, the only significant change being that the Stage Plan and Product Description are now referred to as extracts or references to them, and there is now a separate section titled "Tolerances"
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