**Executive Summary Report - Programme Management IPMA Level A and B**

IPMA Level A

IPMA Level B

|  |  |
| --- | --- |
| Programme | [title of the reference programme] |

|  |  |
| --- | --- |
| First name, last name |  |
| Employer |  |
| e-mail |  |
| Telephone | [Provide number for follow-up enquiries] |

|  |  |
| --- | --- |
| Version | [Version number of the executive summary report] |
| Date |  |

Formal criteria

|  |  |
| --- | --- |
| Submission | After receiving the task 'Upload ESR' as a single PDF file including attachments |
| File name | Last name\_first name\_ESR\_Vn (n = version number) |
| Number of pages | Maximum of 15 pages, excluding title page and indices, including appendices |
| Font | Do not change the font or size of the text |
| Tables | Smaller text sizes are permitted, at least 8 Pt. |
| Headings | Use formats from the format templates |
| Reference text | Remove grey reference text after completing the document |

##### Contents

[1. Information about the organisation 4](#_Toc490663851)

[1.1. Company 4](#_Toc490663852)

[1.2. Position within the company 4](#_Toc490663853)

[1.3. Programme and project management in the company 4](#_Toc490663854)

[2. Reference programme 5](#_Toc490663855)

[2.1. Purpose of the programme 5](#_Toc490663856)

[2.2. Programme starting situation 5](#_Toc490663857)

[2.3. Budget and workload 5](#_Toc490663858)

[2.4. Deadline plan 5](#_Toc490663859)

[2.5. Programme complexity 5](#_Toc490663860)

[2.5.1. Goals and result assessment 5](#_Toc490663861)

[2.5.2. PP&PM processes, methods, tools and techniques 6](#_Toc490663862)

[2.5.3. Resources and funding 6](#_Toc490663863)

[2.5.4. Opportunities and risks 6](#_Toc490663864)

[2.5.5. Stakeholders and integration 6](#_Toc490663865)

[2.5.6. Relations with the permanent organisation 6](#_Toc490663866)

[2.5.7. Cultural and social context 6](#_Toc490663867)

[2.5.8. Leadership, teamwork and decision-making 7](#_Toc490663868)

[2.5.9. Degree of innovation and operating conditions 7](#_Toc490663869)

[2.5.10. Need for coordination 7](#_Toc490663870)

[2.6. Summary and management of the complexity 7](#_Toc490663871)

[2.7. Confirmation of your information 7](#_Toc490663872)

[3. Further programme or project from the certification application 9](#_Toc490663873)

[3.1. Purpose 9](#_Toc490663874)

[3.2. Starting situation 9](#_Toc490663875)

[3.3. Budget 9](#_Toc490663876)

[3.4. Most important complexity drivers 9](#_Toc490663877)

[3.5. Summary and management of the complexity 9](#_Toc490663878)

[4. Further programme or project from the certification application 10](#_Toc490663879)

[4.1. Purpose 10](#_Toc490663880)

[4.2. Starting situation 10](#_Toc490663881)

[4.3. Budget 10](#_Toc490663882)

[4.4. Most important complexity drivers 10](#_Toc490663883)

[4.5. Summary and management of the complexity 10](#_Toc490663884)

##### Reference persons

Please name two reference persons who are able to confirm your statements in this document. One of these two persons should be your client for the reference programme. These persons should be contactable using the specified contact data.

First reference person

|  |  |
| --- | --- |
| First name, last name |  |
| Role or function |  |
| Link to the project |  |
| e-mail |  |
| Telephone |  |

Second reference person

|  |  |
| --- | --- |
| First name, last name |  |
| Role or function |  |
| Link to the project |  |
| e-mail |  |
| Telephone |  |

##### Abbreviations used

Please list all abbreviations used in this document in alphabetic order.

|  |  |
| --- | --- |
|  |  |

# Information about the organisation

This chapter should be a maximum of 2 pages long, and should provide the assessors with information about your professional environment.

## Company

Describe the company you currently work for, or for which you worked for until recently:

* Sector and company purpose
* Organisational unit in which you work
* Objectives of this organisational unit
* Project types conducted in the company

## Position within the company

Describe your position within the company

* Your position in the organisation (insert organisational chart)
* Your role or function, including your responsibilities
* Your most important internal and possible external stakeholders

## Programme and project management in the company

Describe the programme and project management of your company:

* Programme and project management processes, including methods as well as their binding nature
* Available support for programme and project management
* Your creative autonomy

# Reference programme

This chapter should not be more than 7 pages long. The reference programme is programme No. 1 from your certification application.

## Purpose of the programme

Describe the purpose of the programme, as well as the originally intended results. Report any possible deviations between these intended results and the ultimately realised results.

## Programme starting situation

Describe the following topics, in order to provide the assessors with a better understanding of the starting situation:

* Company in which the programme or its projects were conducted
* Your client
* Organisation of the programme management, including your position together with your responsibilities
* Your influence on the success of the programme and its projects

## Budget and workload

Detail the programme budget. State your workload for managing the programme, as well as the overall workload for its implementation.

## Deadline plan

Detail the milestone planning.

## Programme complexity

Supply the information required by the assessors, so they can evaluate the complexity of your programme. Base your information on the criteria described in the certification application and set out in the tabular sheet 'CXPgM'. Detail the specific challenges that you encountered and were required to overcome.

### Goals and result assessment

Address the following criteria, and detail their contribution towards the complexity:

* Need for order clarification and demarcation of the projects within the programme
* Target conflicts that need overcoming, and dependencies between the goals of the individual projects within the programme
* Potential impact and benefit of the programme, strategic importance and focus of the programme, impact and effect on the permanent organisation
* Stability of the preconditions and operating conditions; changes to the programme (strategic realignment); impact on acceptance, (re)prioritisation and continuation; interruption and completion of the individual projects in the programme

### PP&PM processes, methods, tools and techniques

Address the following criteria, and detail their contribution towards the complexity:

* Availability of processes, methods, tools and techniques
* Your creative autonomy or the binding nature of your instructions when selecting and developing  
  ® the PM specifications, processes, standards and methods, tools and techniques; guidelines
* Availability of support in the programme (PMO) and its quality; building up and provision of support for the individual projects

### Resources and funding

Address the following criteria, and detail their contribution towards the complexity:

* Annual investment volumes, internal and external costs (on-balance-sheet)
* Availability and qualification of personnel resources, their influence on the allocation to the individual project managers, impact on the training and further training of the project managers
* Your personal contribution to budgeting and funding the programme, control of financial resources
* Your influence over contracts and procurement, receivables management (claims)

### Opportunities and risks

Address the following criteria, and detail their contribution towards the complexity:

* Long-term relevance and potential opportunities potential of the programme, your ability to exercise influence
* Risks at the programme level, number of risky projects in the programme, risks to the implementation of the strategy
* Definition of the risk categories of the projects, preventative and corrective specifications/measures for the individual projects

### Stakeholders and integration

Address the following criteria, and detail their contribution towards the complexity:

* Number and listing of stakeholder categories (promoting and hindering interest groups) at the programme level, including the number of suppliers and sub-suppliers.
* Analysis of the interests of stakeholders at the programme level
* Public interest and dealings with government authorities, internal and external visibility

### Relations with the permanent organisation

Address the following criteria, and detail their contribution towards the complexity:

* Influence over the programme and permanent organisation; extent of the cultural, local and organisational changes in the permanent organisation brought about by the programme
* Experience of the permanent organisation with similar programmes as a success factor
* Consolidated reporting and anticipatory communication of the relevant reporting issues (hard and soft factors) to the line manager, management of the escalation

### Cultural and social context

Address the following criteria, and detail their contribution towards the complexity:

* Cultural, social, geographical and linguistic diversity
* Number of involved interdisciplinary units and departments (IT, infrastructure/real estate, HR, marketing/sales, security, corporate development, etc.) in the permanent organisation

### Leadership, teamwork and decision-making

Address the following criteria, and detail their contribution towards the complexity:

* Your direct management scope (number of subordinate project managers in the programme)
* Influence over the selection, training and deployment of the project managers; informal and workable networking of key persons in the programme
* Decision-making authority and realisation, your autonomy, responsibility for the approach and result, coordination and controlling of the projects

### Degree of innovation and operating conditions

Address the following criteria, and detail their contribution towards the complexity:

* Number of projects in the programme that bring about product and/or process innovation, your personal contribution towards ideas management
* Profile of the utilised technologies, influence of the technology selection of the individual projects, novelty for the permanent organisation
* Clarification of the programme demarcation (restrictions, operating conditions, framework for action) with the client, acceptance of the solution variants, delegation in accordance with the principle of congruency

### Need for coordination

Address the following criteria, and detail their contribution towards the complexity:

* Number, relevance, dissimilarity and complexity of the active projects during the course of the programme
* No redundant system goals between the projects in the programme, degree of influence by and over other projects and programmes, active exchange and comparison with other projects and programmes
* Safeguarding the announcement; publication of information and data within the context of the defined classifications; adherence to the agreed communication methods and channels; unlimited, proactive involvement of the client
* Need for more resources in consultation with the permanent organisation, continual comparison with the strategy and investment planing, life cycle analysis

## Summary and management of the complexity

Summarise the complexity to be mastered in programme, and detail how you specifically mastered this.

## Confirmation of your information

Arrange for your information to be confirmed by a signature provided by the client If you are no longer able to contact the client, then please select another suitable person. Cite this person as reference above in this document.

I confirm the information set out in the reference project:

|  |  |
| --- | --- |
| First name, last name |  |
| Company |  |
| Role in the project and/or company |  |
| Date |  |
| Signature |  |

# Further programme or project from the certification application

Please amend the title of the chapter. Update the table of contents. This chapter should not be more than 3 pages long.

## Purpose

Describe the purpose of the programme or project, as well as the originally intended results. Report any possible deviations between these intended results and the ultimately realised results.

## Starting situation

Describe the following topics, in order to detail the environment for the assessors:

* Company in which the programme or its projects were conducted
* Your client
* Your position in the programme or project
* Your influence on the success of the programme or project

## Budget

Detail the programme or project budget. State your workload for managing the programme or project, as well as the overall workload for its implementation.

## Most important complexity drivers

List the most important complexity drivers of the programme or project, and explain what impact these have on the work or the management of the programme or project. Base your information on the criteria described in the certification application and set out in the tabular sheet 'CXPgM' or 'CXPM'. Focus above all on criteria that were less complex in the reference programme.

## Summary and management of the complexity

Summarise the complexity to be mastered in the programme or project, and detail how you specifically mastered this.

# Further programme or project from the certification application

Please amend the title of the chapter. Update the table of contents. This chapter should not be more than 3 pages long.

## Purpose

Describe the purpose of the programme or project, as well as the originally intended results. Report any possible deviations between these intended results and the ultimately realised results.

## Starting situation

Describe the following topics, in order to detail the environment for the assessors:

* Company in which the programme or its projects were conducted
* Your client
* Your position in the programme or project
* Your influence on the success of the programme or project

## Budget

Detail the programme or project budget. State your workload for managing the programme or project, as well as the overall workload for its implementation.

## Most important complexity drivers

List the most important complexity drivers of the programme or project, and explain what impact these have on the work or the management of the programme or project. Base your information on the criteria described in the certification application and set out in the tabular sheet 'CXPgM' or 'CXPM'. Focus above all on criteria that were less complex in the reference programme.

## Summary and management of the complexity

Summarise the complexity to be mastered in the programme or project, and detail how you specifically mastered this.