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

IPMA Level A

IPMA Level B

|  |  |
| --- | --- |
| Project | [Name of the reference project] |

|  |  |
| --- | --- |
| 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](#_Toc490724127)

[1.1. Company 4](#_Toc490724128)

[1.2. Position within the company 4](#_Toc490724129)

[1.3. Project management within the company 4](#_Toc490724130)

[2. Reference project 5](#_Toc490724131)

[2.1. Purpose of the project 5](#_Toc490724132)

[2.2. Project starting situation 5](#_Toc490724133)

[2.3. Project budget 5](#_Toc490724134)

[2.4. Deadline plan 5](#_Toc490724135)

[2.5. Project complexity 5](#_Toc490724136)

[2.5.1. Goals and result assessment 5](#_Toc490724137)

[2.5.2. PP&PM processes, methods, tools and techniques 5](#_Toc490724138)

[2.5.3. Resources and funding 6](#_Toc490724139)

[2.5.4. Opportunities and risks 6](#_Toc490724140)

[2.5.5. Stakeholders and integration 6](#_Toc490724141)

[2.5.6. Relations with the permanent organisation 6](#_Toc490724142)

[2.5.7. Cultural and social context 6](#_Toc490724143)

[2.5.8. Leadership, teamwork and decision-making 6](#_Toc490724144)

[2.5.9. Degree of innovation and operating conditions 7](#_Toc490724145)

[2.5.10. Need for coordination 7](#_Toc490724146)

[2.6. Summary and management of the complexity 7](#_Toc490724147)

[2.7. Confirmation of your information 7](#_Toc490724148)

[3. Project No. 2 from the certification application 8](#_Toc490724149)

[3.1. Purpose of the project 8](#_Toc490724150)

[3.2. Project starting situation 8](#_Toc490724151)

[3.3. Project budget 8](#_Toc490724152)

[3.4. Most important complexity drivers 8](#_Toc490724153)

[3.5. Summary and management of the complexity 8](#_Toc490724154)

[4. Project No. 3 from the certification application 9](#_Toc490724155)

[4.1. Purpose of the project 9](#_Toc490724156)

[4.2. Project starting situation 9](#_Toc490724157)

[4.3. Project budget 9](#_Toc490724158)

[4.4. Most important complexity drivers 9](#_Toc490724159)

[4.5. Summary and management of the complexity 9](#_Toc490724160)

##### 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 project. 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

## Project management within the company

Describe the project management of your company:

* Project management processes, including methods as well as their binding nature
* Available project management support
* Your creative autonomy

# Reference project

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

## Purpose of the project

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

## Project starting situation

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

* Company in which the project was conducted
* Your client
* Your position with your responsibilities in the project (project organisational chart)
* Your influence over the success of the project

## Project budget

Detail the project budget in tabular form.

## Deadline plan

Detail the deadline planning. A graphic depiction is suitable here (phases or other deadline planning).

## Project complexity

Supply the information required by the assessors, so they can evaluate the complexity of your project. Base your information on the criteria described in the certification application and set out in the tabular sheet 'CXPM'. 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
* Target conflicts and dependencies between the goals that need to be overcome
* Potential impact and benefit of the project
* Changes and their impact on the project content, costs and deadlines

### 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 structural autonomy, or the binding nature of this
* Availability of support and the quality thereof

### Resources and funding

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

* The personnel resources deployed in the project:  
  workload in man-days performed under your responsibility, your own workload in your role
* Cash-out in CHF as well as its intended purpose
* Availability and qualification of the personnel resources
* Your personal contribution towards the funding of the project
* Nature and manner of the order placement: internal, external, through offers and invitations to tender

### Opportunities and risks

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

* Potential for opportunities available in the project, and its significance for the success of the project
* Overall risk of the project
* Biggest risks together with their likelihood of their occurrence and the extend of their damage
* Nature of the measures to avoid or reduce risks

### Stakeholders and integration

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

* Number and list of the stakeholder categories for which you are responsible
* Interests of the stakeholders and their relation to those of other stakeholders (divergence)
* Public interest and dealings with government authorities

### Relations with the permanent organisation

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

* Nature, scope and effects of reciprocal influences between the project and permanent organisation
* Experience of the permanent organisation with similar projects as a success factor
* Workload and significance of the reporting and communications for the success of the project

### Cultural and social context

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

* Handling cultural, social and linguistic diversity within the project
* Geographic distribution of the persons involved in the project
* Specialist disciplines that need taking into account at the project settlement level

### Leadership, teamwork and decision-making

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

* Your management scope and the resulting challenges for you
* Number of persons involved in the project
* Momentum of the team-building and integration of new team members
* Your decision-making authority as well as your personal contribution towards the taking of the necessary decisions

### Degree of innovation and operating conditions

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

* Impact of the project or project results on product and process innovation
* Profile of the utilised technologies
* Your degree of autonomy when it comes to developing the solution

### Need for coordination

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

* Dependency on/from other projects/programmes and the resulting challenges
* Number and list of the coordinated performance renderers
* Contractual documents and your personal contribution to these
* Challenges associated with confidentiality as well as the handling thereof in the project

## Summary and management of the complexity

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

## Confirmation of your information

Arrange for your information to be confirmed by a signature provided by the project 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 |  |

# Project No. 2 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 of the project

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

## Project starting situation

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

* Company in which the project was conducted
* Your client
* Your position within the project

## Project budget

Detail the project budget in tabular form.

## Most important complexity drivers

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

## Summary and management of the complexity

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

# Project No. 3 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 of the project

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

## Project starting situation

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

* Company in which the project was conducted
* Your client
* Your position within the project

## Project budget

Detail the project budget in tabular form.

## Most important complexity drivers

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

## Summary and management of the complexity

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