PRINCE2® tailoring

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Table of contents

Understanding PRINCE2 tailoring

Tailoring, alongside the principles, themes, and processes, is the fourth element within PRINCE2. Tailoring to suit the project environment is also one of the seven principles of PRINCE2. The goal of tailoring is to establish a degree of project management that does not overtax the project team, but instead offers suitable governance, planning, and control in line with PRINCE2's principles, with a risk level deemed acceptable.

Tailoring in PRINCE2 refers to the steps taken by the project management team to the themes, processes, roles, and management products to ensure that it meets the needs of a project's environment.

Every project context is different – the shape, size, and nature of the project, as well as the external environment within which the project operates. Therefore, PRINCE2 must be tailored to each individual project's specific needs.

The 7 principles are described in detail in all PRINCE2 training courses. For the two PRINCE2 exams, PRINCE2 Foundation students are required to know the tailoring principle as well as understand which aspects of PRINCE2 can be tailored. PRINCE2 Practitioner students are required to demonstrate their understanding of how to tailor the processes, themes, management products and project roles.

Document tailoring

The project manager is tasked with identifying and documenting the extent of tailoring for the project. Because tailoring influences the project's management, it is incorporated into the Project Initiation Documentation (PID), which is evaluated by relevant stakeholders and authorized by the project board. Both the project board and the project manager might receive guidance from project assurance, project support roles, or a centre of excellence (if available).

Agreeing the tailoring requirements

It is during the 'initiating a project' process that the project manager tailors the method for the specific project.

When doing this, the project manager often must modify the guidance and oversight of a project to accommodate internal and external influences impacting the project's execution. Any departure from the company's typical project management style should be recorded and agreed upon.

To do this the project manager should follow the following 5 steps.

1. Evaluate the project brief to gain insight into any initial tailoring plans (if specified).
2. Draw from similar past projects, corporate, program management, the customer, and outside entities to understand how tailoring was implemented.
3. Document the proposed tailoring within the project initiation documentation (PID).
4. Collaborate with project assurance to verify that the suggested tailoring satisfies the project board's needs as well as those of the corporate, program management, or customer.
5. Request approval for any tailoring from the project board (though they might choose to assess it later as part of the PID).

Five aspects that can be tailored

There are 5 aspects of PRINCE2 that may be tailored:

1. Processes could be merged or modified.
2. Themes might be applied using techniques suitable for the project.
3. Roles could be consolidated or divided, as long as accountability is upheld, and conflicts of interest are avoided.
4. Management products might be combined or separated into multiple documents or data sources.
5. Terminology can be altered to match other standards or policies, as long as it's consistently applied.

Tailoring requires skill

Successful tailoring requires competence, experience, and judgement. There isn't a single 'correct' tailoring approach for a project. Individuals within organizations exhibiting a high level of project management capability or maturity will likely find tailoring more straightforward than those in less mature organizations. These individuals may also tailor differently, reflecting their organization's advanced skills and competencies.

Tailoring doesn't equate to excluding any of PRINCE2's processes or themes. PRINCE2 comprises interconnected components: themes are utilized in processes; techniques activate these themes; individuals fulfil project roles and generate management products. If the practitioner neglects any component, project management may be compromised, thereby reducing the likelihood of project success.

Environmental and project factors

Environmental and project factors can restrict and shape how a project should be tailored. When required, project processes and procedures should integrate the organization's internal policies, processes, methods, standards, and practices.

Tailoring may need to consider standards, policies, laws, or regulations external to the organization, such as the environment. In certain regulated sectors, such as rail or aerospace, obligatory certification checkpoints might guide the selection of the most suitable project lifecycle and management stages.

The project's characteristics also influence how PRINCE2 should be adapted. The proficiency of project participants (how experienced they are with project management) often dictates the degree of detailed guidance required. Contracts with customers or suppliers must be factored in when contemplating tailoring.

Specialized products also play a role, as specialists usually adhere to their unique working practices (such as agile delivery). The project manager's responsibility is to unify these practices, ensuring the project's outputs and outcomes are produced, and benefits are realized.

The project's context in relation to ongoing programmes or as part of a portfolio also matters. In these cases, processes, procedures, techniques, or approaches might be given by a project, programme, or portfolio office (PMO) for the project manager to adopt.

For effective governance, maintaining a clear chain of accountability from any higher level (organization, portfolio, or programme) to the project level is crucial.

Why a common project management approach is needed

Most organizations carry out more than a single project. Large ones potentially oversee hundreds or thousands of projects. Expecting each project manager to tailor PRINCE2 directly for every project's management approach and controls is inefficient. It places a high burden on the time of senior management, stakeholders, and project teams who must familiarize themselves with unique approaches for each project.

Additionally, it becomes challenging to apply learnings from one project to others. Teams might consistently devise varying methods for identical tasks. Establishing common information support systems is difficult without a common approach. Training tends to be generic, focusing less on an organization's specific challenges, thereby diminishing effectiveness.

Therefore, many organizations find it more beneficial and efficient to create their own project management method, grounded in PRINCE2 and tailored to meet their organization's unique needs.

The positive impact on business performance through the effective application of project management methods across organizations is evident in maturity assessments: the higher an organization's maturity level, the more efficient it is in business terms.

Terminology

Consistent terminology plays a significant role, as uniform use of words facilitates communication and comprehension. The organization's method should, to the extent possible, mirror the language used within the organization. Challenges arise when various business segments employ different terminology, even though neither may be incorrect. Therefore, it is beneficial to agree upon the definitions of essential project management terms in advance.

Build a glossary

Developing a glossary is frequently one of the initial tasks in formulating the method, as it serves as a guide for terminology to be used throughout the method. One approach is to begin with a standard glossary, such as PRINCE2, and use it as a foundation to construct the organization's own glossary. Modify individual words as needed, supplement definitions to enhance understanding, and include alternative names under 'also called' in the glossary to assist people in becoming familiar with any new terms. Update the glossary when required, making amendments or additions.

Tailoring processes, themes, and role descriptions

Tailoring processes, roles, and product descriptions are intrinsically connected. Activities within a PRINCE2 process are executed by a project management team role to generate a management product.

It is sensible to start with adjusting the PRINCE2 processes, updating them to incorporate any new terminology, and revising the process model and activity flows, to reflect the organization's operational method. Detailed role and product descriptions can subsequently be tailored to align with the process modifications.

The processes most likely requiring changes will include those related to directing a project, specifically those associated with approving funding for projects or project stages, as finance departments usually have specific 'delegation schemes' defining decision rights relating to project authorization.

PRINCE2's themes are utilized within specific activities in the processes. The organization must choose how each theme is used in its project management method. Having well-defined organizational procedures for aspects such as risk, change, quality, and communications ensures these aspects are addressed consistently and alleviates the burden on each project manager to define their own, as they can refer to the organization's approach.

Project life cycles

Incorporating a standardized lifecycle model into an organizational project management approach can be beneficial. This model outlines the objective of each management stage and connects back to PRINCE2 processes and themes.

Standardizing the project lifecycle allows the organization to gain an overview of its portfolio of projects' progression. This standardization can be taken a step further. Instead of merely depicting a generic project, it can mirror specific types of projects by integrating specialist activities into the relevant stages, such as for capability and product development, software development, construction, corporate mergers, and complex change.

Managing the method

Once a method has been established, it requires management and maintenance. Therefore, the method should include guides, procedures, or processes that explain how it is managed, along with corresponding roles and product descriptions. The roles should incorporate one for managing the overall architecture of the method, ensuring the process model and its elements function collectively.

Modifying one component may influence other components, and thus, change control should be considered as part of this. Another role would involve the management of each component of the method, which would enable the method architect to delegate different individuals to manage each component.

Tailoring rules and guidelines

Any method derived from PRINCE2 should incorporate the 7 principles, including the principle of tailoring. This implies that the method should contain rules and guidelines for tailoring. This could be encapsulated in a few pages of text or might require extensive detail, explaining if and how each element of the method could be tailored.

Since PRINCE2 is applicable regardless of the project's complexity or scale, organizations may think about classifying their projects by complexity and providing guidance on how each category should be tailored. The objective is to assist project practitioners in determining what constitutes 'just enough' project management to ensure project success.

The more complex the project, the more information is produced. A project manager should guarantee that the method of storing and distributing information is efficient and secure. For simpler projects, a logbook and wall display may be adequate, but for more complex projects, especially those with distributed teams, information systems will need to be developed and implemented.

Embedding the tailored method

After spending the effort and resources in tailoring PRINCE2 to meet the organization's needs, the next step would be to embed it into the organization. Embedding PRINCE2 requires a change management approach so that all practitioners start to apply the method in a consistent way across all projects.

PRINCE2 Tailoring FAQs

Table of Contents

What is tailoring in PRINCE2?

Tailoring is one of the 4 integrated elements of PRINCE2, along with the principles, themes, and processes. Tailoring is also one of the 7 PRINCE2 principles.

What can be tailored in PRINCE2?

In PRINCE2, the 4 elements that can be tailored include:

1. The PRINCE2 themes
2. The PRINCE2 processes
3. The PRINCE2 management
4. The PRINCE2 project management team roles and responsibilities.

Who is responsible for tailoring in PRINCE2?

In a PRINCE2 project, the project manager is responsible for tailoring the method for its appropriate use on the project. The project manager will be advised by project assurance and must consider requests or advice given by the project board members.

During the initiating a project process, the project manager must document in the project initiation documentation (PID) which elements are being tailored and why. This section of the PID must also justify the reasons for tailoring and explain which parts of any corporate standards or process are being applied.