Executive Summary Report

**For IPMA Levels A, B and C candidates**

Purpose

The purpose of this document is to provide directions how to prepare executive summary report for IPMA level A or B candidate working in project/program/portfolio management.

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| --- | --- | --- | --- | --- |
| **Candidate Name** |  | | **Link to candidates CV** | |
| **Level you apply for** | IPMA Level A | IPMA Level B | | IPMA Level C |
| **Domain** | Project | Program | | Portfolio |

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| --- | --- | --- | --- |
| Description of employer’s organisation | | | |
| Organisation name: |  | | |
| Number of employees | < 250 | 250 - 5.000 | > 5.000 |
| Main line of company’s industry | E.g. software development, banking | | |
| Role of applicant within employer’s organisation | | | |
| An organisation chart with applicant position identified |  | | |
| Area of responsibility |  | | |
| An overview of the Portfolio Management processes / procedures used |  | | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Summary for all projects/programs/portfolios** | | | | |
| Name | Start Date | End Date | Duration (in months) | Score of complexity |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**On the following pages, templates are provided for the Project Summary (page 2), Program Summary (page 3), and Portfolio Summary (page 4). Depending on the selected domain, only the table related to the chosen domain should be filled in.**

**For example, if the selected domain is a program, use only page 3, and delete pages 2 and 4.**

|  |  |
| --- | --- |
| **Summary of the project #1** | |
| Goal of the project and main deliverables |  |
| Time schedule and phases | Project start/finish dates: xx.xx.xxxx - xx.xx.xxxx  List all phases covered: |
| Management effort | Total no of men months of management/ total number of man months of execution |
| Total budget |  |
| Resources available | Personnel :   * No of persons total (peak) in the project * No of persons reporting to you |
| Contractors | * No of contractors * No of subcontractors |
| Stakeholders | Relationship with internal and external stakeholders |
| Project Control methods and documents used (tick off) | Project assignment  Work Breakdown Structure  Milestone schedule  Stakeholder management  Risk and opportunity management  Resource plan  Cost and finance plan  Earned Value report  Progress report  Others (list) |
| Description of project challenges | Describe how you have managed project and how you met the complexity criteria. You can use the STAR approach (Situation, Task, Action, Result) in order to structure the report.   * Situation/challenge * Effort to deal with it * Outcome * Reference to CEs   You can include the links to the information in complexity criteria form |

Copy the table above for the purpose of displaying each of the previously mentioned projects in the project list.

|  |  |
| --- | --- |
| **Summary of the programme #1** | |
| Strategical benefit of the program for the organization | Describe the main benefits and deliverables of the program |
| Time period of program and projects within program | Program time period: xx.xx.xxxx - xx.xx.xxxx  Project 1 xx.xx.xxxx - xx.xx.xxxx  Project 2 xx.xx.xxxx - xx.xx.xxxx  Project 3 xx.xx.xxxx - xx.xx.xxxx  Project 4 xx.xx.xxxx - xx.xx.xxxx  Project 5 xx.xx.xxxx - xx.xx.xxxx |
| Management effort | Total no of men months of management/ total number of men months of execution |
| Total budget |  |
| Resources available | Personnel :   * No of persons involved into program management * No of people in total (peak) in the projects * No of people reporting to you |
| Contractors | * No of contractors * No of subcontractors |
| Stakeholders | Relationship with internal and external stakeholders |
| Description of programme management | Describe the program management organization.  Describe the methods, tools, techniques and documents used. |
| Description of programme challenges | Describe how you have managed program and how you met the complexity criteria. You can use the STAR approach (Situation, Task, Action, Result) to structure the report.   * Situation/challenge * Effort to deal with it * Outcome * Reference to CEs   You can include the links to the information in complexity criteria form |

Copy the table above for the purpose of displaying each of the previously mentioned programs in the program list.

|  |  |
| --- | --- |
| **Summary of the portfolio #1 (max one page)** | |
| Portfolio strategical alignment | Describe how the portfolio is aligned with the mission, vision and strategy of organization, what are objectives and planned benefits of the portfolio |
| Your workload (% of total) |  |
| Total budget |  |
| Resources available | Describe available resources (People, Equipment, Materials, Infrastructure, Tools and other assets) |
| Stakeholders | Relationship with internal and external stakeholders |
| Description of portfolio management | Describe the organization of the portfolio and its component projects and programmes  Describe the methods, tools, techniques and documents used for portfolio management |
| Description of portfolio management challenges | Describe how you have managed portfolio and how you met the complexity criteria. You can use the STAR approach (Situation, Task, Action, Result) in order to structure the report.   * Situation/challenge * Effort to deal with it * Outcome * Reference to CEs * You can include the links to the information in complexity criteria form |

Copy the table above for the purpose of displaying each of the previously mentioned portfolios in the portfolio list.