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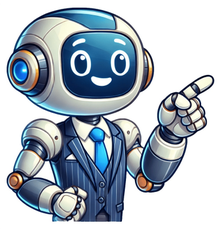

< Development Cooperation Handbook | Designing and Managing Programmes Programme formulation is the process of choosing the who, what, how, when, and where of persuing programme objectives. Programme plans generally do not contain many details on the activities to be carried out and the outputs expected by these activities: these are specified at the project specification level. Program formulation provides a framework where different projects, sharing the same overall objectives, can be conceived and implemented in a co-ordinated manner. A good programme design will give answers to the following questions: What is the cultural and policy approach that is expected to be used in the implementation methodologyWhat is the expected quality standard and how to achieve it?How will the project or programme be monitored, evaluated and its impact measured?How will the organization learn from the programme? How are cross-sectoral issues of development considered in the programme? Programme plan Guideline: How to manage programmes for a learning organization that is projectized and employee empowering. Issue 8 How to design and manage successful cooperation programmes? In other sections of this handbook Organizational Types Organizational Structure Organizational Culture The projectized organization The learning organization The employee empowering organization The Organizations mission The Organizations vision Designing and Managing Projects The 3 level hierarchy of programme objectives Project Managers and programme Managers Program Formulation and Preparation is a critical phase within the Program Management Professional (PgMP) framework and the broader Program Life Cycle Management. This stage lays the foundational groundwork for a successful program by defining its objectives, scope, and strategic alignment with organizational goals. During formulation, program managers engage in comprehensive needs analysis to identify the problem or opportunity the program intends to address. This involves stakeholder analysis to understand and document the expectations, requirements, and potential impacts on various parties involvedPreparation entails developing a detailed program plan that outlines the roadmap for achieving the desired outcomes. This includes establishing clear program objectives, setting measurable goals, and defining key performance indicators (KPIs) to monitor progress. Resource planning is a crucial component, where managers allocate necessary resources such as budget, personnel, and technology, ensuring they are available and appropriately utilized throughout the programs lifecycleRisk management strategies are also formulated during this phase to anticipate potential challenges and devise mitigation plans. Establishing governance structures and decision-making protocols ensures that the program remains aligned with organizational priorities and can adapt to changes or unforeseen issues effectively. Additionally, communication plans are crafted to facilitate transparent and consistent information flow among stakeholders, fostering collaboration and buy-inAnother essential aspect is the development of a program schedule that outlines timelines, milestones, and deliverables, providing a clear timeline for execution and accountability. By thoroughly addressing these elements during the Formulation and Preparation phase, program managers set a solid foundation that enhances the likelihood of program success. This stage ensures that all aspects are meticulously planned and that the program is strategically positioned to deliver value, meet its objectives, and contribute positively to the organizations mission and vision. Effective formulation and preparation not only streamline the execution phase but also provide a framework for monitoring, controlling, and ultimately achieving the programs intended benefits. Program Formulation and Preparation is a crucial stage in the program life cycle, laying the groundwork for successful program execution. It involves clearly defining the program's objectives, scope, and expected benefits while aligning them with the organization's strategic goals.Why it's important:Thorough program formulation and preparation ensures that the program is well-defined, properly scoped, and has the necessary resources and stakeholder support to achieve its objectives. It helps to:- Align the program with organizational strategy- Identify and engage key stakeholders- Establish clear goals and success criteria- Plan for resource allocation and risk managementWhat it is:Program Formulation and Preparation involves:- Defining the program's vision, mission, and objectives- Identifying and analyzing stakeholders- Developing the program charter and program management plan- Establishing the program governance structure- Identifying and prioritizing program components and projects- Assessing program risks and planning for risk managementHow it works:1. Program Definition: Clearly define the program's purpose, objectives, and expected benefits, ensuring alignment with the organization's strategy.2. Stakeholder Engagement: Identify and analyze key stakeholders, their interests, and their influence on the program. Develop a stakeholder engagement plan to effectively communicate and manage their expectations.3. Program Charter and Management Plan: Develop the program charter, which formally authorizes the program and outlines its high-level objectives, scope, and governance structure. Create a program management plan that details how the program will be executed, monitored, and controlled.4. Program Governance: Establish a governance structure that defines roles, responsibilities, and decision-making processes for the program.5. Program Components and Projects: Identify and prioritize the projects and other work that will be undertaken to achieve the program's objectives.6. Risk Assessment and Planning: Identify potential risks that could impact the program's success and develop risk management strategies to mitigate or respond to these risks.Exam Tips: Answering Questions on Program Formulation and Preparation1. Understand the key concepts and processes involved in program formulation and preparation, such as defining objectives, engaging stakeholders, and establishing governance.2. Be familiar with the contents and purpose of the program charter and program management plan.3. Know how to identify and prioritize program components and projects based on their alignment with the program's objectives and expected benefits.4. Recognize the importance of risk assessment and planning during the formulation and preparation stage.5. Apply your knowledge of program formulation and preparation to scenario-based questions, identifying the most appropriate actions or decisions based on the given context. Test mode: Program formulation is the first and critical stage in the program life cycle. It's where the vision is articulated, the strategy is crafted, and the blueprint for the entire program is laid out. It's akin to an architect drafting the initial plans for a magnificent building, ensuring that every detail aligns with the intended outcome. While it is true, parts of this early vision may need to change or be adjusted based on broader company/team need (so dont be rigid, flexibility is key) - this is where you start. Key Components of Program FormulationVision and Goal Setting: This is where the overarching purpose of the program is defined. What are the key objectives and WHY are those objectives relevant for what you are doing? (Try to get down to the base principles that are driving the work). What does success look like in 1 month, 1 quarter, 1 year? These questions form the cornerstone of the program's direction. Strategic Alignment: Here, the program's goals are aligned with the broader organizational strategy (assuming there is one). This ensures that the program contributes meaningfully to the company's overall objectives and does not operate in isolation. If you dont have something to work from, then work backwards to define the base principles of your team/work/organization and create goals that are geared toward ensuring success of you and the company. Stakeholder Identification and Analysis: Understanding who the stakeholders are, their interests, and their influence is crucial. This step involves mapping out all the parties that will be affected by or can affect the program. Lets be honest though - this isnt always as straightforward as it may seem - especially if youre new to a team or area. So do your best to write down names, responsibilities, and meet LOTS of people - and define how they may or may not fit into your stakeholder map. Then, be sure to update that map frequently as you move forward. Feasibility Study: Conducting a thorough assessment of the program's viability financially, technically, and operationally. This involves looking at resource availability, potential risks, and the estimated impact. You may not have the luxury of doing this when you start (e.g. you inherit a program) but it doesnt mean it should't be done, and updated frequently. Knowing your programs viability on an ongoing basis will help you to plot a course to ensure both the program and its usefulness to the company are maintained. Initial & Ongoing Resource Allocation: Determining what resources are required to kick-start the program. This includes human resources, technology, finances, and other necessary tools. Then as you move forward, revisit these resources frequently to ensure youre not over or under spending in order to delivery on your key objectives. High-Level Planning: Sketching out a high-level plan that outlines the major phases, key deliverables, and tentative timelines. This high-level blueprint will provide you with a north star to ensure your on the right path. TheImportance of Program Formulation The formulation phase is critical as it sets the stage for everything that follows. It provides a clear direction and a robust framework for the program, ensuring that every subsequent decision and action contributes effectively towards the set goals. This phase also helps in identifying potential challenges early on, allowing for proactive measures to mitigate risks. As the foundational step in the program life cycle, formulation is where the blueprint for success is created. It requires strategic thinking, careful planning, and a comprehensive understanding of the programs goals and its alignment with organizational objectives. We highly suggest gong through each of the above steps to establish a solid foundation and set of artifacts to help guide you. Navigating this phase effectively paves the way for a well-structured and successful program. Formulation (or Designing) phase of programme cycle management How do we Develop Programmes programme management The deliverable that terminates the identification phase (and opens the designing phase of programme cycle management) is the Programme scope document. The deliverable that terminates the designing phase (and opens the of implementation phase of the programme cycle management) is the Programme Plan. Design or formulation is the second stage in the programme cycle management, preceded by the identification stage and followed by the other phases of execution and evaluation. Programme formulation is the process of choosing the who, what, how, when, and where of persuing programme objectives. Since we are moving at a programme level there will be decisions regarding particular projects, but only decisions about how to set up a system that will make project management and integration possible. During programme implementation projects will be designed which will focuses on defining clear, discrete activities and the work needed to complete them. So program plans generally do not contain many details on the activities to be carried out and the outputs expected by these activities. These details will be specified at the stage of project design at the stage of project origination. What the programme formulation will indicate is a list of programme specific objectives (that will become the overall objectives of projects), the reasons why these objectives where set and a list of possible actions and development sectors that are considered to be suited to the achievement of programme objectives. A good will also describe how the achievement of these objectives is expected to have a wider impact thanks to the use of project results by project beneficiaries and other project stakeholders. Program formulation therefore provides a framework where different projects, sharing the same overall objectives, can be conceived and implemented in a co-ordinated manner. (See also: the 3 level hierarchy of project/programme objectives). A programme will generate benefices for internal and external stakeholders; there is a communality of interests for all stakeholders that the project is a success. A programme plan may have a different format according if it is meant for the project partners as external stakeholders. When the plan is meant mainly for an audience of internal stakeholders the operations plan may contain more details for specifying all the tasks required for managing the activities and delivering the expected products/services. However in many cases external stakeholders like donors and other partners will be interested to see such details and monitor the implementation of activities because they have to justify to others the resources they have invested in the project/programme. In all group relationships, there will be some self-interest that may not be in line with the common interest, like some people saving their time and putting inadequate effort in their tasks, vendors charging higher costs, leaders claiming responsibility of all the successes and blaming others for the problems, etc. A good programme plan will minimize conflict of interests as much as all the reciprocal expectations are well defined and documented and a system of monitoring and support is in place. Planning is not everything: team spirit and a visionary leadership are essential for a project success; but without a good plan misunderstand and disappointment will almost be inevitable. In this stage a logical framework can be prepared for summarising and schematizing the programme purpose and strategy. There may also be an indication of activities and resource requirements for managing the origination, supervision and evaluation of project. A budget for these program-level activities may be defined. But in a really projectized organization program developers will not develop project details as this will be done a coordinated effort with project managers and project teams. A programme should contain budget indication regarding what is the expected cost of the projects and of project origination, supervision and evaluation. it should also give inductions on how the projects are expected to obtain the financial resources they will need. (see Programme / Project financial planning and management) A good program will also identify and attribute specific responsibility in the programme management team in generating project and animate the process of producing the programme results chain (from project deliverable to outcomes, up to programmes impacts) so that the steps of the process are specifically attributed to the managerial structure, where specific professional positions are considered primarily accountable for expected results;considering internal audit and budget tracking as programme implementation actions, so reporting about them clearly and evaluate their efficiency and transparency. (See Programme Governance; clarifying the relationship: Responsibilities of Project Managers and programme Managers) A good programme design will give answers to the following questions: While designing the programme we will consult with the main stakeholders to verify the logical coherence coherence of the project design in deciding the specific objectives, the general objectives, the activities intended to achieve the objectives, the methodology adopted and the expected impact . This consultation is also calledex ante evaluation. An organization aiming at programme program quality should establish a system of Monitoring and Evaluation. In fact in order to ensure program quality programme managers need to use the feed back of monitoring and evaluation in order to: check whether the programme or project is being implemented according to plans and assess whether the programme of project is resulting in the anticipated changes or impacts (thereby fulfilling the basic requirement for a projectized organization); identify key learning points to feed back in improved programme design and management (thereby fulfilling the basic requirement for a learning organization); identify the need and the scope to raise the capacity of the human resources of the organization to manage successfully their task and contribute to the generation of a healthy communication climate within the organization and with external stakeholders. (thereby fulfilling the basic requirement for an employee empowering organization). A good programme design will consider how to monitor and evaluate during and after the implementation phase (in itinere and ex post). It will therefore decide what are the indicators and what are the sources of information for judging the efficiency, the effectiveness and the impact. Information sources may be independent from the programme/project management team and the organization. Others will be the internal evaluation tasks that will collect data concerning processes and outcomes. Programme designers will consider the standard methods of collecting and analyzing data and will adopt those that are seen as most suitable. Eventually a new approach may be proposed. After deciding on the method there will be an illustration of the evaluation activity within the program/project, including the indications regarding how to use the monitoring/evaluation results for improved programme/project management for organization development and for employee empowerment and learning. (see evaluation reporting methods; and methods for generating acceptance for the evaluation reports). The elements of an evaluation action are illustrated in the chapter on program evaluation. Achieving professional reputation through the application of high standards in all aspects of organizational culture and management style is a fundamental requirement for generating an organizational imagethat is a prerequisite for a successful partnership management. The Programme Plan is the that terminates the designing phase (and opens the of implementation phase of the programme cycle management. The plan will usually contain the following sections: partnership managementProgramme quality plan You may consider subsections for: Logistic, Monitoring & Evaluation, Quality Mananagemet, Risk management, Team Training, Project Communication management, Issues Management; Management Change Control Process Management Acceptance of Deliverables Organizational Change Management. Document Management Meeting Management etc. Templates see Programme Planning Checklist see Programme Execution Checklist Guidelines: Plan Writing Other resources: (Europe Aid: PCM Manual) Issues to be considered in Program Management --- program stages 3.0 NASA Program/Project Life Cycle3.1 Program Formulation3.2 Program Implementation3.3 Project Pre-Phase A: Concept Studies3.4 Project Phase A: Concept and Technology Development3.5 Project Phase B: Preliminary Design and Technology Completion3.6 Project Phase C: Final Design and Fabrication3.7 Project Phase D: System Assembly, Integration and Test, Launch3.8 Project Phase E: Operations and Sustainment 3.9 Project Phase F: Closeout3.10 Funding: The Budget Cycle3.11 Tailoring and Customization of NPR 7123.1 RequirementsThe program Formulation Phase establishes a cost-effective program that is demonstrably capable of meeting Agency and mission directorate goals and objectives. The program Formulation Authorization Document (FAD) authorizes a Program Manager (PM) to initiate the planning of a new program and to perform the analyses required to formulate a sound program plan. The lead systems engineer provides the technical planning and concept development or this phase of the program life cycle. Planning includes identifying the major technical reviews that are needed and associated entrance and exit criteria. Major reviews leading to approval at KDP I are the SRR, SDR, PDR, and governing Program Management Council (PMC) review. A summary of the required gate products for the program Formulation Phase can be found in the governing NASA directive (e.g., NPR 7120.5 for space flight programs, NPR 7120.7 for IT projects, NPR 7120.8 for research and technology projects). Formulation for all program types is the same, involving one or more program reviews followed by KDP I where a decision is made approving a program to begin implementation. PurposeTo establish a cost-effective program that is demonstrably capable of meeting Agency and mission directorate goals and objectivesTypical Activities and Their Products for Space Flight ProgramsIdentify program stakeholders and usersDevelop program requirements based on user expectations and allocate them to initial projectsIdentify NASA risk classificationDefine and approve program acquisition strategiesDevelop interfaces to other programsStart developing technologies that cut across multiple projects within the programDerive initial cost estimates and approve a program budget based on the projects life cycle costsPerform required program Formulation technical activities defined in NPR 7120.5Satisfy program Formulation reviews entrance/success criteria detailed in NPR 7123.1Develop a clear vision of the programs benefits and usage in the operational era and document it in a ConOpsReviewsMCR (pre-Formulation)SRRSDR The program management lifecycle includes the basic phases or stages that all programs move through, from conception to closure. At its most basic level, the program lifecycle includes program definition, benefits delivery, and closure.In some ways, a program management lifecycle is similar to a project management lifecycle. For example, both include initiation, execution, and closure phases or sub-phases. A project management lifecycle, however, aims to finish one specific project on time and within budget, whereas the aim of a program management lifecycle is ongoing and strategic to the organization. A program lifecycle can extend much longer, with a program continuing for years before its closed.Learn more about the differences between program management and project management in our comprehensive guide. A modern approach to project and portfolio management can help equip you and your teams to tackle projects and programs at scale. This handbook will help you:Identify pain points in your current processesLearn from examples of businesses using modern PPM strategiesImplement your own updated PPM strategyGet your free handbook Experts recommend that organizational leaders take some important pre-planning steps to evaluate a possible program and, if they decide to start the program, to build it on a solid foundation.Some experts consider these five steps to be part of a separate pre-planning stage, which occurs before the first program management lifecycle phase begins. Other experts consider this pre-planning to be part of the formulation sub-phase, which is part of the program definition phase.In either case, the pre-planning tasks are similar and will set your program up for success. They include these five key steps:Identify Your Mandate: Decide what the organization is trying to accomplish as it considers setting up a program.Understand the Strategic Value of the Proposed Program: Ensure you understand how the goal of the program will serve the strategic goals of the organization.Identify and Assign the Sponsor: Find a top leader within the organization to sponsor the program. The sponsor must agree with the creation of the program and be committed to its goals.Identify Key Stakeholders and Their Interest and Expectations in the Program: Determine which stakeholders within or connected to your organization will care about the program and its goals. Take time to assess and understand the expectations those stakeholders will have for the programs work. What do they hope the program will accomplish?Find and Assign the Program Manager: Identify someone who has the proper skills and experience to manage the program and assign them as your program manager. Learn more about the essential skills needed to become a good program manager in our comprehensive guide to program management. Download Program Pre-Planning ChecklistMicrosoft Word |Adobe PDF | Google DocsYou can use a checklist to track the five steps you need to take as you decide whether or not to set up a program. Many experts consider the program management lifecycle to have three primary phases: program definition, program benefits delivery, and program closure. Others suggest a slightly different lifecycle of five or more phases that roughly parallel those three phases.The following table shows some of the common variations on these program management phases. All of the variations have some similarities in how they outline the development of a program: Below, youll find more detailed information on these three primary phases, as well as expert advice on successfully implementing each phase of your program. In the program definition phase, the object is to establish the reason for the program and define goals and objectives. In this phase, you also acquire final approvals for the program, set up the program structure, and assign roles. An organization has short- and long-term goals, says Yad Senapathy, founder and CEO of the Project Management Training Institute. They take these goals and objectives and translate them into an organizational strategy. This organizational strategy typically could spin into multiple sets of portfolios, then have the programs within them. The program then looks up to this organization strategy, looks up to this portfolio, and starts with this one big phase called the program definition phase. The definition phase is centered around the purpose of the program objectives, says Jake Carroll, the founder of Create Kaizen. Whats the mission of the program? Its really answering all of the questions: why are we tackling this versus some other issue?Just at the beginning, Caroll says, standing up a program may feel a little bit like project management in that you have some sort of defined scope that you need to get buy-in and investment for. You need to have a little bit of a sense for how long it's going to take to build this.Learn more with our comprehensive guide to best practices in program management.The program definition phase has two sub-phases: program formulation and program preparation. Below is detailed information about these two sub-phases and some tips on how to approach them:Program Formulation Sub-PhaseSome experts consider formulation tasks to be part of pre-planning before the program definition phase. Other experts, however, consider those tasks to be part of the program formulation sub-phase within the program definition phase. In either case, program formulation involves important steps in establishing the program and setting it up for success.The main components of the program formulation sub-phase are as follows:Create the Business Case: Early in this sub-phase, you will need to make a compelling business case for setting up the program. Why will the cost of the program be worthwhile to the organization? How will it serve the organizations strategic objectives?Carroll explains that the business case document needs to answer an important question: What is the net benefit for the consumer or the business? Otherwise, why would any executive want to sign off on the development of that program?You need to understand what is the business case for even creating this specific program, says Senapathy. A strong business case, he goes on, will explain, Heres the specific business that we have. Here are the overall expected benefits that we need to address as part of this program. The program is trying to deliver these strategic initiatives.Use the following strategic goals checklist to help create a program that serves your organizations needs. This checklist includes five steps to help you ensure that your program stays focused on that ultimate mission. Download Program Strategic Goals ChecklistMicrosoft Word |Adobe PDF | Google DocsSecure Program Financing: After you establish the business case, youll need to secure all necessary approvals to finance the program.Create Program Charter: The program charter will include details on program objectives, potential benefits, and scope, as well as how the program aligns with the organizations strategic objectives.A program management charter is an authorizing document, Senapathy says. A charter is saying: Here are certain objectives that the program wants to change. Here's a sponsor who wants to stick in a certain amount of money to this, and the sponsor is putting their weight behind this program. And here's this rough sketch of scope, schedule, and finances. Now we are blessing it. In other words, the program manager is official. The program is official. The objectives are official.For additional resources, see our collection of program management templates, including a program charter template that will help you identify the objectives of your program.Perform Initial Study of Scope: Assess and set out the scope of the program. What work and areas will it and will it not cover? Perform Initial Study of Cost: Assess your expectations for startup and ongoing costs of the program.The types of questions you might ask at this stage, Carroll says, include, What types of resources are we going to need? Who are we actually taking those resources away from? He adds, The cost isn't just the people that I'm gathering. It's also the opportunity costs on whatever they're going away from. Its a double investment. Program managers must also think in these early phases about short- and long-term costs of projects within the program, says Rick Cherf, associate professor at Washington State University and founder of Total Construction Services, Inc. A building may last anywhere from 40 to 100 years, depending on the quality of the construction. The first 2 years are the design and construction. Then you manage that facility for the next 38 years. So facility maintenance and maintenance and repair all of those things are important.Perform Initial Resource Estimate: Along with costs, you will want to determine which resources you can make available to the program.That could be planning the execution and what that program actually looks like, says Carroll. Whos going to be involved? What resources might you need internally? That could be resources like people, or it could be resources like money. You also need to develop some sort of timeline for the program.If your organization has a program management office, use them as a resource to help with this step and other steps in the formulation sub-phase.Learn more about program management offices and how they help programs succeed with our comprehensive guide.Perform Initial Risk Assessment: Identify the likely risks to the program and how you will set up a structure to manage those risks.When we bring this team together for a program analysis, says Cherf, one of the questions you ask is: Whats going to keep us awake at night? Your team should perform a detailed assessment of all those possibilities. Then we put those up on the board and start talking about the critical issues we have to deal with, Cherf continues.Cherf shares one story about a program he worked on while building the $2 billion Tacoma Narrows Bridge across Puget Sound in Washington. Program leaders found that 60 percent of the cables were in danger of rusting. That means youd have to buy 1.6 times as much cable, which would cost about $20 million more. So they got an insurance program from Lloyds of London, and they also talked to the cable manufacturers to make sure they put a certain kind of coating around the cables. All those little things could impact you. You talk to the people who are responsible for those portions of the program, and you ask them: Whats going to bite us? What do we need to do? So when it happens, we're not sitting around going, Oh my God. Weve already thought about that.Create Program Plan: The program plan is more detailed than the program charter. It may include plans for governance, communication, resource management, and other details. This step can take place during the formulation sub-phase or during the program preparation sub-phase.A program management plan is a how-to, says Senapathy. How do you go about implementing the whole program? How do you interact with one another? When a change occurs, is there a system to follow? How do you manage scope within the program? How do you manage the schedule of the program? How does financial management occur within a program?I like to use the word framework, says Cherf. Its a framework. Were putting together the assumptions, the deliverables, the what do we need to do? What kind of framework do we want to set up to make sure that we're operating in the right? Program Preparation Sub-PhaseIn this sub-phase, your team might finalize the program plan, set up a detailed governance system, and better define the programs architecture. The purpose of this sub-phase is to get your program ready for launch.The following are the main components of the program preparation sub-phase:Establishing Program Governance Structure: Finalize a structure that your organization will use to manage the program.Developing Benefit Realization Plan: Determine how you will assess and measure benefits of the program.Identify Program Team: Decide who you want on your program team. Identify potential employees for internal transfer or determine if you will need to find external hires.Detail Program Objectives: Write program objectives to help focus the programs work.This is answering the why, says Carroll, and includes internal operations goals as well as external business goals. This also helps with scope creep when stakeholders want to add different nuances that they prefer but that may not help the original vision and purpose.Define and Sequence Activities: Define activities that are important for the beginning of the program. When you complete those early activities, move the program forward to the next required activity.Carroll points out that the rigor of program definition and early phase analysis will differ between bigger, more established companies and smaller, younger companies.I think people pick and choose the components of program definition analysis depending on the needs of their company, Carroll says. I did what I would consider a fairly robust lifecycle management for a growth stage company that had a trajectory toward enterprise-level status in the future. The rigor that you need to stand up a program for a company that's in a hyper-growth stage, thats much more rigorous than for a startup. The program benefits delivery phase is the phase in which your team performs the actual work of creating the program. This stage begins after program leaders review and approve the program management plan. Some also call this the deployment phase.In this phase, your team will start work on various components of the program and begin working to meet program objectives. Many experts consider this phase to have three sub-phases, which include component authorization and planning, component oversight and integration, and component transition and closure.Component Authorization and Planning Sub-PhaseIn the component authorization and planning sub-phase, your team will establish the components of the program or the individual projects that comprise the program as a whole. These projects should each address specific objectives that your organization established in the program definition phase. In this phase, your organization may also assign team members to do the work on specific projects within the program.Component Oversight and Integration Sub-PhaseDuring the component oversight and integration sub-phase, your teams will begin work on individual projects. This phase also involves oversight to make sure all projects are integrated with each other and with the overall program goals.The following are some important steps within the component oversight and integration sub-phase:Initiating projects that will ultimately deliver benefitsManaging the transition from your organizations current state to its new state as the program progressesEnsuring that projects meet your organizations business requirementsContinually assessing progress against the objectives laid out in your planIdentifying and monitoring risks to the projects and the programContinually monitoring for issues that might diminish the benefits that youre expecting the program to produceCoordinating the dependencies among projects and ensuring a smooth and efficient timelineCoordinating to ensure the program is using resources efficientlyCommunicating with important stakeholdersComponent Transition and Closure Sub-PhaseIn the component transition and closure sub-phase, your teams will work to successfully finish projects after theyve delivered their intended benefits. In this third sub-phase, teams will verify that components have met objectives and delivered benefits. Next, they will begin the transition to other ongoing work.Some experts also recommend a fourth sub-phase called benefits appraisal. The goal of benefits appraisal is to provide an overall assessment of all benefits the program has produced. After this appraisal, leaders might call to end the program because it has met its objectives. On the other hand, they might choose to expand or otherwise change the program.At this point, Carroll says, organization leaders should ask the following questions: Whats our return on investment? If we were to look forward, should we either expand the current scope of this program or pivot the scope of the program to tackle a new issue? Or scrap the program completely? What do those different scenarios look like?What you often find, Carroll continues, is that you have a lot of existing programs that need to be maintained, or they need to be expanded to grow and serve new user problems, whether the user is a customer to the company or internal employees. You might need further investment. You might need to tweak the way people work in order to get more out of the current investment. I think this is all encompassed in this reflection period. The program closure phase is the final phase in the program management lifecycle. In this phase, you will measure program benefits and determine how unresolved work will be completed. This phase is also an excellent opportunity to reflect on the programs successes and failures and synthesize all the lessons learned. Some experts also call this the dissolution stage.Many experts consider the program closure phase to have two sub-phases: program transition and program closeout.Program Transition Sub-PhaseDuring the program transition sub-phase, your team will assess and document the benefits of the program and ensure that there is a plan in place to complete any unfinished work.Program Closeout Sub-PhaseIn the program closeout sub-phase, the program manager formally releases all resources from the program. This phase may include dispensing of certain technical resources or reassigning team members to new projects. Program leaders document and deliver final records on the program, and the team completes a final program report. This report, also called a lessons learned document, details successes and failures of the program, unforeseen risks, and other information that will be useful as your organization creates and operates new programs in the future.As you complete the program closeout, be sure to complete the following tasks:Retrospective on Program Successes or Failures: An assessment of the program may happen during the component transition or the closure sub-phase of the benefits delivery phase. Either way, you will want to do a final assessment of the successes and failures of any program that is ending.There needs to be some sort of retrospective, Carroll says. Some people call it a post-mortem, but that's usually more negative. It's a retrospective on how the entire process went. What were our original goals? Did we meet those goals?Review of Program Benefits: Youll want to review benefits of the program, as well as intended benefits that werent realized, with key stakeholders.Lessons Learned Document: Once you document lessons learned in the final report, determine actions your organization can take to ensure any problems or challenges in the closed program are lessened or eliminated in future programs.Program Disband: Programs end for many reasons. but Senapathy says organization leaders often end them for one of two contradictory reasons. In some cases, he says, the organization is reaching, or nearly reaching, the objectives and goals for the program, so it can end. In other cases, the program isnt achieving what it needs to achieve and the financial drain is so bad that key executives are beginning to notice it significantly. They just need to pull the plug, Senapathy says. All program activities generally fall within these main phases of a program lifecycle. The following table shows details on what specific activities fit within program phases. By embracing an adaptive program management lifecycle, your team will continually assess how programs are working and adapt plans and strategies as needed. Program leaders who are adaptive are always analyzing program benefits and challenges and assessing new business opportunities.In an adaptive program management lifecycle, the program management process is iterative. Plans change more frequently, even if it means diverging from the plan that program managers may have written months before.Oftentimes, the adaptive nature of taking new information and reacting to it is more important than anything else, Carroll says. From simple task management and project planning to complex resource and portfolio management, Smartsheet helps you improve collaboration and increase work velocity -- empowering you to get more done. 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