

A PRACTICAL BEGINNER'S GUIDE

PRINCE2 Simplified

From the first idea to a confident project handover

Plan clearly. Deliver in stages. Decide with confidence.

An easy-to-read companion for a new project manager, with a complete workflow, a running example and practical checklists.

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Based on PRINCE2 Version 7 concepts
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Welcome

Your first project can feel like several jobs at once: organising people, answering questions, watching deadlines and keeping stakeholders informed. A method gives those tasks a structure. This book turns that structure into actions you can use.

Read the workflow first, then follow the chapters as your project develops. Use the checklists as prompts for conversations and decisions. They are practical examples you can adapt to your organisation.

The example used throughout

A small organisation wants a new website. Its current site is difficult to update and visitors struggle to find services. The new site must be useful, easy to maintain and ready for staff to operate. All budgets, dates and targets in this book are illustrative.

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CHAPTER 1

The method in plain English

PRINCE2 helps you organise decisions as well as work. You agree why a project should happen, define what it must deliver, divide delivery into manageable stages and check whether continuing still makes sense.

Three questions to keep asking

- Why are we doing this? Make the expected value clear.
- What must we deliver? Agree the result and how it will be accepted.
- Who can decide? Know your authority and when to ask the Project Board.

The seven principles [1]

Principle	Beginner's reminder
Continued business justification	Keep checking the reason for investing.
Learn from experience	Use lessons before and during delivery.
Roles, responsibilities and relationships	Make ownership and working relationships clear.
Manage by stages	Plan and approve work in manageable sections.
Manage by exception	Escalate forecasts beyond delegated limits.
Focus on products	Define the deliverables before scheduling activities.
Tailor to suit the project	Choose controls that fit the work.

Try it

Write one sentence explaining your project's purpose. Then name the person who will decide whether its outcome is acceptable.

CHAPTER 2

Your project workflow

The seven processes are not seven consecutive stages. Board direction continues throughout; the project manager and delivery teams work alongside each other. [1]

When	Process and practical action
Before commitment	Starting up a project: check whether detailed planning is worthwhile.
Throughout	Directing a project: the Board authorises, guides and makes major decisions.
First management stage	Initiating a project: establish an agreed foundation for delivery.
During delivery	Controlling a stage: the project manager assigns work and monitors it.
Alongside stage control	Managing product delivery: teams accept, complete and deliver agreed work.
Before the next stage	Managing a stage boundary: review performance and seek the next authorisation.
At the end	Closing a project: confirm acceptance and organise handover.

The approval gates

Seek authorisation to initiate, then authorisation for the project and first delivery stage. At later stage boundaries, request approval for the next stage. Seek approval for closure when the project has been reviewed.

Website example

Initiation -> design stage -> build and launch stage -> closure. Design approval gives the team a clear basis for building. A short project may need only initiation and one delivery stage.

A stage boundary review follows initiation too. At the end of the final delivery stage, move to closure rather than planning another normal stage. [1]

CHAPTER 3

People and responsibilities

A schedule cannot answer a question, resolve a disagreement or adopt a new way of working. People do those things. PRINCE2 Version 7 explicitly places people within the method. [2]

Role	What you need from them
Project Executive	Accountability for the project and its business justification; chairs the Board.
Senior User	Represents those who will use the outcome and benefit from it.
Senior Supplier	Represents the expertise and resources needed to deliver it.
Project Manager	Manages day-to-day work within agreed authority.
Team Manager	Coordinates delivery of assigned work packages; this role can be combined where appropriate.
Project Assurance	Independently checks business, user and supplier interests on behalf of the Board.
Project Support	Helps with records, administration and project information.

Have these conversations early

- Who accepts each deliverable, and who checks its quality?
- Who is available to make decisions when the usual approver is absent?
- Who will maintain the outcome after handover?
- Which people will need training, support or a change to their routine?

Website example

Ask a staff representative to review the editing process before launch. A beautiful website will deliver little value if staff cannot keep its information current.

CHAPTER 4

Starting up a project

Your aim is to decide whether to invest in detailed planning. Begin with the request or mandate: what has the organisation asked for, and why? Avoid making firm promises before you understand the work.

Your actions

- Speak with the sponsor and potential users about the problem.
- Describe the expected outcome and the main boundaries.
- Identify major constraints, dependencies and obvious risks.
- Review relevant lessons from previous projects.
- Identify the key management roles and a possible delivery approach.
- Prepare the Project Brief and a plan for the initiation stage.

Make the brief useful

Explain the need, the proposed outcome, initial scope, likely costs and benefits, major risks and who will be involved. Estimates at this point may be ranges. Record the assumptions behind them so they can be tested.

Website example

Need: visitors struggle to find service information. Proposed outcome: an accessible website with clear service pages and a simple editing process. Outside initial scope: a customer portal and online payments.

Before you move on

Ask the Board to authorise initiation. Be clear that this decision funds and permits the planning work; it does not automatically approve all delivery expenditure.

Common mistake

Treating the original request as a complete specification. Ask users what problem they need solved before accepting a list of features.

CHAPTER 5

Initiating a project

Turn the initial idea into a workable agreement. Your goal is a shared understanding of the work, its value and how it will be controlled.

Build the foundation

- Confirm scope, deliverables and acceptance criteria with users.
- Develop the Business Case, including costs, benefits, options and risks.
- Create an overall Project Plan and a detailed plan for the next stage.
- Agree how to manage quality, risks, issues, information and communications.
- Set reporting arrangements and delegated decision limits.
- Record the agreed arrangements in the Project Initiation Documentation (PID).

A practical Business Case

Compare the proposed investment with realistic alternatives, including doing nothing. Explain who benefits, how improvement will be measured and who will check it. Include operating costs after delivery, not only the cost of building the solution.

Website example

The team proposes a PLN 30,000 budget. The hoped-for benefit is fewer routine telephone enquiries because visitors can find answers online. Agree a baseline, a target and a review owner before presenting this as a measurable benefit.

The decision

Present the PID, updated Business Case and next Stage Plan for approval. Resolve unclear responsibilities and acceptance conditions before the team commits to delivery.

Keep it usable

For a small project, linked short documents and one shared workbook may be sufficient. Keep ownership, version control and approval records clear.

CHAPTER 6

Plan what you will deliver

Start with the deliverables, then work out the activities needed to create them. This makes estimates easier to discuss because everyone can see what the effort is intended to produce.

A practical planning sequence

- List the required deliverables and their dependencies.
- Describe what each deliverable must contain or do.
- Agree quality checks and the people who will accept it.
- Identify the activities, skills and resources needed.
- Estimate effort with the people doing the work.
- Build the schedule around dependencies and real availability.
- Add costs, assumptions, risks and control points.

Website deliverable	Example acceptance evidence
Approved page designs	User representative signs off layouts and navigation.
Working website	Agreed functional checks pass; defects are handled against agreed criteria.
Staff guidance	A staff member can update a page using the instructions.
Handover package	Support contacts, access arrangements and maintenance responsibilities are accepted.

Use the right level of detail

Keep the overall plan focused on stages and key milestones. Plan the current stage in more detail. Update estimates as evidence improves, while retaining an approved baseline for comparison.

Try it

Choose one deliverable. Complete this sentence: "We will accept it when ____, checked by ____, using ____." If you cannot finish the sentence, clarify the requirement before scheduling the work.

CHAPTER 7

Controlling a stage

During delivery, you keep a reliable view of progress and act while there is still time to recover. Compare the forecast with the approved plan; completed tasks alone do not tell you whether the stage will finish successfully.

Your control cycle

- Authorise clear work packages.
- Collect progress information from team leaders.
- Check deliverable completion and quality evidence.
- Update forecasts for time, cost and remaining work.
- Review risks, issues, dependencies and required decisions.
- Take corrective action within your authority.
- Report progress and escalate forecast exceptions.

A useful Highlight Report

Give the Board a short picture of overall status, completed deliverables, upcoming milestones, forecasts, significant risks and decisions needed. State what changed and what it means for the project.

Website example

The design team has completed four of six page layouts. The remaining two depend on approved service content. Rather than reporting "67% complete", explain the dependency, name the content owner and show the forecast impact on design approval.

Ask better progress questions

- What is finished and accepted?
- What remains, and how much effort will it take?
- What is blocked, and who can unblock it?
- What evidence supports the current completion forecast?

Common mistake

Waiting for the deadline to be missed before raising concern. Forecast problems early and present a practical response.

CHAPTER 8

Managing product delivery

The delivery team needs a clear agreement about its assignment. A work package can be a brief document or an agreed record in your project system, provided the responsibilities and controls are clear.

Before work starts, agree

- What must be delivered and what is outside the assignment.
- The quality requirements, checks and acceptance route.
- The available time, budget and resources.
- Dependencies, constraints and relevant risks.
- How progress will be reported and issues raised.
- Who receives the finished deliverable.

During delivery

The Team Manager coordinates the work, monitors progress and alerts you to concerns. You help resolve dependencies and decisions that sit outside the team's authority. Avoid changing the assignment informally without checking its impact.

At completion

Review the agreed evidence and receive the completed work. A task being marked "done" is not enough if a required quality check is missing. Record what was accepted and how outstanding items will be handled.

Website work package

Deliverable: six approved page layouts. Owner: design lead. Required check: user review of navigation and readability. Dependency: approved service text. Reporting: brief progress update every Friday. Completion: agreed design approval recorded.

Make room for collaboration

Invite the team to challenge estimates and unclear requirements before accepting the assignment. A concern raised early is useful planning information.

CHAPTER 9

Approve the next stage

A stage boundary is a deliberate pause for a decision. Completing a stage does not mean the next one should automatically begin. Give the Board enough evidence to judge what should happen next.

Prepare the review

- Compare actual results with the approved Stage Plan.
- Confirm which deliverables have been accepted.
- Explain variances, unresolved issues and lessons.
- Update the overall Project Plan and Business Case.
- Review risks and whether the expected benefits remain realistic.
- Prepare the next Stage Plan and request authorisation.

Make a clear recommendation

State whether you recommend continuing as planned, changing the approach or stopping. Explain the evidence and the consequences of each realistic option. Record the Board's decision and any conditions.

Website example

The designs are approved, but the content migration estimate has doubled. Present the revised cost, staffing options and impact on launch. The Board may approve extra resources, reduce scope through the agreed change route or reconsider the investment.

Apply the lesson immediately

If late content caused delays in design, give every remaining page a content owner and approval date before the build stage starts. Lessons are useful when they change how the next stage is managed.

Before work resumes

Confirm the next stage's budget, deadline, deliverables, tolerances and reporting arrangements. Make the approved decision visible to the people carrying out the work.

CHAPTER 10

Handle change and exceptions

A risk is an uncertain event that could affect objectives. An issue needs attention now, such as a request to change scope, a problem or a deliverable that does not meet its specification. Give each item an owner and a response.

A simple change route

- Record the request and its reason.
- Assess effects on deliverables, cost, schedule, benefits and risks.
- Recommend options and identify the authorised decision-maker.
- Obtain the decision before committing to the change.
- Update the affected plans and communicate the approved change.

Understand tolerances

Tolerances are the limits of delegated authority. PRINCE2 Version 7 addresses time, cost, quality, scope, benefits, risk and sustainability. [2] Agree relevant limits and how forecasts will be checked.

Illustrative exception

The Board approves a stage budget of PLN 10,000 with a PLN 1,000 overspend tolerance. Your latest forecast is PLN 11,500. Raise an Exception Report when you forecast the breach; do not wait until the money has been spent.

Explain the cause, likely consequences, available options and your recommendation. The Board may ask for an Exception Plan. Do not assume the original authority covers the extra expenditure.

If the team raises a problem

First check whether you can resolve it within your own stage authority. If the project itself is forecast to exceed limits set by the business layer, the Board must escalate to that higher level.

Common mistake

Treating a small-looking extra feature as free. Even a simple request can add testing, training and support work.

CHAPTER 11

Close and hand over

A project is ready for closure when its outcome has been reviewed and ongoing ownership is clear. Finishing development is only part of that job. The recipient must be able to operate and support what you hand over.

Your closure actions

- Confirm acceptance against the agreed criteria.
- Verify handover to the people responsible for operations and support.
- Record outstanding items, owners and follow-on actions.
- Compare overall performance with the approved baseline.
- Capture useful lessons and recommendations.
- Confirm who will review benefits after closure and when.
- Prepare the End Project Report and recommend closure to the Board.

Make handover practical

Check support contacts, instructions, training, warranties where relevant, and secure access arrangements. Have the receiving team demonstrate that they can perform essential tasks. Name the owner of every unresolved item.

Website example

Staff can update service pages, support contacts are recorded and the maintenance owner accepts responsibility. The benefits owner will compare routine enquiry volumes three months after launch using the agreed baseline.

If the project stops early

Organise closure deliberately: establish what has been produced, preserve useful work, record obligations and risks, and agree next actions. Explain why the original outcome was not achieved.

Remember

Some benefits occur after the project ends. Closure should leave a clear review plan and an accountable owner for measuring them.

CHAPTER 12

Your working routine

A repeatable routine reduces last-minute surprises. Adapt the frequency below to the pace and risk of your project; PRINCE2 does not require this exact timetable.

Each working day

- Check urgent blockers and decisions.
- Confirm who owns each immediate action.
- Update significant risks and issues.
- Protect time for the most important work.

Each week

- Review accepted deliverables and remaining work with the team.
- Refresh time and cost forecasts.
- Check dependencies and stakeholder commitments.
- Review the next two weeks of work.
- Send the agreed progress report and request specific decisions.

At each approval point

- Confirm that the Business Case remains credible.
- Check acceptance evidence and unresolved items.
- Present the next plan or closure recommendation.
- Record the decision and tell those affected.

A useful status sentence

"Design approval is forecast for 18 November, three days later than planned, because two content reviews are outstanding. The content owner will confirm a recovery date tomorrow. The stage remains within its agreed time tolerance."

Your first priority

When joining a project already underway, find the current approved plan, clarify who can make decisions and check the latest forecast. Then verify acceptance criteria and the most significant unresolved risks. This gives you a reliable starting point.

Your practical toolkit

Copy these prompts into your working documents. Keep answers brief, specific and owned by named people.

1. Project Brief starter

Project name: ____
 Problem to solve: ____
 Expected outcome: ____
 Included / excluded scope: ____
 Main assumptions and constraints: ____
 Initial benefits, costs and risks: ____
 Sponsor and key roles: ____
 Initiation approval required from: ____

2. Work package starter

Deliverable and owner: ____
 Quality and acceptance criteria: ____
 Checker / approver: ____
 Dates and available resources: ____
 Dependencies and limits: ____
 Progress reporting and escalation route: ____

3. Status update starter

Overall status and reason: ____
 Accepted deliverables this period: ____
 Next milestones: ____
 Forecast finish and cost: ____
 Significant risks / issues: ____
 Decision needed, owner and date: ____

4. Closure starter

Acceptance evidence: ____
 Operational handover owner: ____
 Remaining actions and owners: ____
 Performance against baseline: ____
 Lessons to reuse: ____
 Benefits review owner and date: ____
 Board closure decision: ____

Use one source of truth

Keep approved versions and decision records easy to find. A document is useful when people can rely on it to act.

Quick reference

Term	Plain-English meaning
Business Case	Why the investment is worthwhile and should continue.
Product	A deliverable, such as a design, service, system or document.
PID	The agreed foundation for how the project will be managed.
Stage Plan	The detailed plan for a management stage.
Work Package	The agreement for delivering assigned products.
Tolerance	An agreed limit of delegated authority.
Exception	A forecast breach of an agreed tolerance.
Baseline	An approved version used for comparison and control.
Acceptance criteria	The conditions the outcome must meet for acceptance.
Benefit	A measurable improvement resulting from the project's outcome.

Practices to keep in view

Business case, organising, plans, quality, risk, issues and progress are the seven practices. They help you manage the same essential concerns throughout the lifecycle. [1]

Further reading and source notes

[1] PeopleCert. *PRINCE2 7 Foundation: Official Quick Reference Guide*. Consulted 13 October 2026. Used to check the method's structure and terminology. Available via NILC:

[Official Quick Reference Guide \(PDF\)](#)

[2] PeopleCert. *PRINCE2 Project Management Foundation (Version 7)*. Consulted 13 October 2026. Overview of people, project performance and tailoring.

[PeopleCert Version 7 overview](#)

The website scenario, sample wording, templates and suggested working routines are original practical illustrations. They are not prescribed PRINCE2 forms. Use the official manual and syllabus for formal study.