

Tailoring Project Management Methodology Checklist

Use this checklist to determine which elements the tailored project management methodology should have.

- Project selection, justification, and approval process
- Project phases, stage gates and/or milestones
- Project governance
- Project sponsorship
- Delegated authority limits
- Project roles and responsibilities
- Business case preparation
- Project charter preparation
- Project management software selection
- Requirements definition, management and control
- Work breakdown structure development and control
- Scope definition, management and control
- Cost estimating, management and control
- Budget development and control
- Project financial processes
- Schedule estimating, management and control
- Monitoring project performance, metrics/KPIs, reporting
- Managing project scope changes
- Project status reporting
- Quality assurance processes
- Process audit procedures
- Quality control processes

- Risk assessment, management and control
- Resource estimation, leveling and management
- Project team formation and development
- Project communications development, distribution and control
- Stakeholder identification, engagement and management
- Customer engagement and management
- Procurement and contract assessment and management
- Vendor management
- Claims administration and resolution
- Health and safety
- Environmental management
- Deliverable acceptance procedure
- Operational handover process
- Project, or phase, closure process and checklist
- Gathering, documenting and evaluation of lessons learned
- Benefits realization and/or post implementation review process
- Methodology tailoring guidelines
- Project change management
- Project complexity assessment
- Form templates