Tailoring Guidelines for Projects

**Table of Contents**

[1 Acquiring Data Warehousing Systems Guidelines 2](#_Toc485807277)

[2 PROCESS CHECKLIST – PLAN & DEFINE PHASES 4](#_Toc485807278)

[3 PROCESS CHECKLIST – DESIGN PHASE 6](#_Toc485807279)

[4 PROCESS CHECKLIST – BUILD PHASE 7](#_Toc485807280)

[5 PROCESS CHECKLIST – DEPLOY PHASE 8](#_Toc485807281)

# Tailoring Guidelines for Projects

| **#** | **Scenario** | **Project Tailoring Recommended** |
| --- | --- | --- |
| 1 | Roles and Responsibilities | Roles and Responsibilities:  Same person may perform multiple roles in the project. Project may add project specific roles. In such cases, roles and responsibilities should be listed in the Project Plan |
| 2 | Delegation of Authority | Project Manager may delegate some of their responsibilities to the team members (e.g. a Project Lead can prepare the Project Plan). In such cases, there should be an e-mail sent with the delegation and also the roles and responsibilities should be tailored and documented. (See Roles for Responsibilities.) |
| 3 | Project Plan Related | Project Manager shall maintain either one Project Plan Document for the entire project or may decide to maintain two documents. One for Plan to Define phases and another for Construct to Deploy phases. |
| 4 | Prototype Plan | Project Manager shall develop Prototype Plan only if the project is developing a prototype to verify requirements. |
| 5 | Supplier not assessed as SEI CMM Level 3 Organization | Project Manager may plan for Supplier's Capability Assessment. This should be incorporated in Project Plan and Schedule. |
| 6 | Monitoring Supplier’s processes | Identify Supplier processes, which are critical for project's success and need Quality Assurance. Identify these as Supplier's processes and should be in the Project's QA Plan. Include both work product and process reviews for the Supplier’s processes. |
| 7 | QA Checklist for Monitoring Supplier’s processes | Prepare a process specific QA Checklist to monitor the critical processes and add to the QA Checklist, which becomes project's tailored QA Checklist. This tailored QA Checklist and QA Plan need to be reviewed and approved by the PM, IO Quality Manager and Supplier's PM. Attach these to Supplier Management Plan. |
| 8 | Project costs which exceed 500K USD (are termed as Large Projects)  Life Cycle Selection | All large projects shall (mandatory) select from the list of approved Life Cycle Models based on the project's characteristics and follow life cycle other than waterfall. (See [**Guidelines for Selection of Life Cycle Models**](http://online-pmo.com/wp-content/Controls/Guidelines%20for%20Selection%20of%20Project%20LifeCycle%20Models.docx)) |
| 9 | Project costs which exceed 500K USD (are termed as Large Projects)  Design Review Committee | For large Projects: Design Review committee to be defined within the project should include SMEs to review AD and System Design Document. This committee helps to maintain design consistent and completed for the increments of the project and as per the life cycle being followed. |
| 10 | Peer Reviews | In case there are more than two Requirements Providers, it is recommended to follow Structured Peer Review type for verifying the Requirements work products. |
| 11 | Joint Technical Reviews | In case the Supplier is new to the organization work environment, it is recommended to have Joint Technical Reviews planned on the System Design Document components to verify IT standards adherence. Supplier Management Plan and Project Plan to list details of the Joint Technical Reviews. Review Feedback is not considered as Defects. |
| 12 | Deployment Team's participation for Non-Functional requirements gathering | In case the System Deployment Manager is not assigned for the project, the Project Manager may have to identify the team member who will assume the role of the project's Deployment Representative. This person shall act as the liaison with the Regional Deployment Organization and provide non-functional requirements for the development of System Requirements Specification work product. |