

# Project Selection

Describe how projects are selected from amongst all the potential projects that could be done.

# Project Justification

Describe how projects are justified using financial and/or non-financial metrics.

# Business Case Preparation

Describe the contents,  
depth and process of  
developing a project  
business case.

# Project Financing Options

Describe how the project  
will be financed.

# Project Prioritization

Describe the process that determines how projects are prioritized.

# Project Approval Process

Describe how a project is approved including the roles that must provide approval.

# Project Phases, Stage Gates and/or Milestones

Describe the project phases and how the project moves across any stage gates, boundaries or notable milestones.

# Project Governance

Describe how governance is provided and the composition of the project steering group or committee.



# Project Sponsorship

Describe the role and  
responsibility of the project  
sponsor.

# Delegated Authority Limits

Describe the roles and levels of delegated authority for decision making on the project.

# Project Roles and Responsibilities

Describe the main roles required on the project and their responsibilities.

# Project Charter Preparation

Describe how the project charter is prepared and authorized.

# Project Management Software Selection

Describe any software you will use to help track, estimate, report or document any part of the project.

# Requirements Definition and Documentation

Describe how project requirements will be gathered and documented.

# Requirements Monitoring and Control

Describe how project requirements will be checked, monitored and how changes to them will be assessed.

# Work Breakdown Structure Development and

Describe how the work breakdown structure is prepared and the format it is documented in.



# Work Breakdown Structure Monitoring and

Describe how the work breakdown structure will be checked, monitored and how changes to it will be assessed.

# Project Scope Definition and Documentation

Describe how the project and product scope will be defined and documented.

# Project Scope Monitoring and Control

Describe how the project scope will be checked, monitored and how changes to it will be assessed.

# Cost Estimating

Describe the processes, tools and techniques used to estimate costs on the project.

# Cost Monitoring and Control

Describe how project cost estimates will be checked, monitored and how changes to them will be assessed.

# Budget Development

Describe the processes, tools and techniques used to prepare and document a project budget.

# Budget Monitoring and Control

Describe how the project budget forecast will be checked, monitored and how changes to it will be assessed.

# Project Financial Processes

Describe any internal financial processes that may influence the project.



# Schedule Estimating

Describe the processes,  
tools and techniques used to  
develop a project schedule.

# Schedule Monitoring and Control

Describe how the project schedule will be checked, monitored and how changes to it will be assessed.

# Monitoring Project Performance

Describe the tools and techniques that will be used to monitor project performance.

# Documenting and Assessing Change Requests

Describe the approved  
project change control  
process.

# Project Status Reporting

Describe how project status will be reported.

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# Quality Assurance Processes

Describe the processes for implementing quality assurance in the project.

# Process Audit Procedures

Describe how quality assurance audits will occur in the project.

# Quality Control Processes

Describe how quality control will be defined, inspected and documented on the project.



# Quality Monitoring and Control

Describe how the quality management processes will be checked, monitored and how changes to them will be assessed.

# Qualitative Risk identification, Assessment and

Describe how risks will be  
identified, documented and  
qualitatively assessed

# Quantitative Risk identification, Assessment and

Describe how risks will be  
identified, documented and  
quantitatively assessed

# Risk Monitoring and Control

Describe how identified risks will be monitored and how changes to the risk register will be assessed.

# Issue Documentation and Monitoring

Describe how project issues will be documented and monitored.

# Resource Estimation and Management

Describe how resources required to complete the work will be estimated and managed.

# Resource Monitoring and Control

Describe how resources required to complete the work will be monitored and changes to them assessed.

# Project Team Formation and Development

Describe how the project team members will be recruited, developed and managed.



# Project Communications Development

Describe how project communications will be defined and documented.

# Project Communications Distribution

Describe the processes,  
methods, tools and  
techniques for distributing  
project communications.

# Project Communications Monitoring and

Describe how project communications will be monitored and how changes to the communications process will be assessed.

# Stakeholder Identification

Describe how project  
stakeholders will be  
identified and their needs  
and expectations  
documented

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# Stakeholder Expectation Management

Describe the processes and strategies for managing and influencing project stakeholder expectations.

# Stakeholder Monitoring and Control

Describe how the stakeholder register will be monitored and changes to it assessed.

# Customer Engagement and Management

Describe how the project customers needs will be identified and managed.

# Procurement and Contract Assessment

Describe the processes,  
tools and techniques for  
preparing, assessing,  
negotiating and  
implementing project  
contracts.

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# Procurement and Contract Monitoring and

Describe how contracts will  
be monitored and how  
changes will be assessed.

# Vendor Management

Describe how suppliers to the project will be managed.

# Claims Administration and Resolution

Describe the processes by which contractual claims are assessed and are resolved.

# Health and Safety Planning

Describe the processes for determining and documenting health and safety requirements on the project.

# Health and Safety Monitoring and Control

Describe how health and safety requirements will be monitored and how changes will be assessed.

# Environmental Management

Describe the processes for determining environmental requirements for the project.

# Environmental Monitoring and Control

Describe how  
environmental requirements  
will be monitored and how  
changes will be assessed.

# Deliverable Acceptance Procedure

Describe how the project deliverable/s will be formally accepted.



# Operational Handover Process

Describe the process for handover of the deliverables to operations.

# Project, or Phase, Closure Process and Checklist

Describe the processes for  
defining project or phase  
closure.

# Gathering, Documenting and Evaluating

Describe how lessons learned will be gathered, documented and archived.

# Benefits Realization

Describe how expected  
project benefits are  
assessed.

# Post Implementation Review

Describe the processes for  
conducting a post  
implementation review of  
the project.

# Methodology Tailoring Guidelines

Describe the processes and guidelines for tailoring the project management methodology to suit individual projects.

# Project Change Management

Describe the overall process for how requested changes will be documented and assessed.

# Project Complexity Assessment

Describe how the level of project complexity will be determined and strategies for dealing with this.



# Organizational Change Management

Describe how  
organizational changes will  
be recognized, documented  
and managed.

# Configuration Management

Describe how project configuration management and version control will occur in the project.

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# Selecting, Justifying and Initiating the Right

Choose the right projects  
for the right reasons.  
Document the expected  
benefits to be delivered.



# Planning the Project

Complete the right amount of planning in all the appropriate and relevant areas. Re-plan as often as required.

# Executing the Project Work

Carry out the work described in the various planning documents.

# Monitoring Progress and Controlling

Check that what you planned to do matches what you are doing. Act according to documented change control process if they don't match.

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# Reporting Project Progress

Produce project reports detailing how the project is progressing against planned metrics and baselines.

# Closing the Project

Complete project closure according to the planned checklist.

# Evaluating Benefits Realization

Examine and document outcomes and benefits delivered. Do they match the original intended benefits?

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## **Instructions continued . . .**

Start by choosing which of the green process steps are appropriate for managing your projects. Use the blank cards to describe your own process steps if necessary. Draw arrows between the cards to indicate steps to be taken. The result will be a process flowchart that describes the steps your projects go through from inception to completion.

Then browse the individual blue processes cards and if appropriate and useful put them on each of the relevant processes. Use the blank cards to describe any processes that aren't already in the pack.

The end result is a graphical display of your very own project management methodology. Take this information and use it to develop your project management methodology user manual by describing what you have built.

## **Instructions (1 of 2):**

This pack of cards is intended to assist you in visually building the foundational steps and processes of your very own tailored project management methodology.

In this pack of cards you will find the following:

- 7 x green process steps cards
- 4 x blank green process steps cards
- 66 x blue processes cards
- 5 x blank blue processes cards

What is not included:

- Descriptions of specific tools and templates - this is because there are thousands of tools and templates, each with their own variants. Once you have constructed the foundational steps and processes of your own project management methodology it is up to you to develop or seek out the right tools and templates for your projects considering the size, type, and complexity of them.