

STRATEGY TO RESULTS

GOVERNANCE & METHODOLOGY • IN PRACTICE

VALUE DELIVERY METHODOLOGY

How to Build Tailored Methods
GUIDE



MICRO • SSP • MLP

Sequential and Iterative / Incremental Development

A Companion Resource for Book 4 through Book 7

URUK PROJECT MANAGEMENT

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Front Matter



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Credits

The cover illustration is borrowed from Book 4 of the Strategy to Results series and it is the artwork of a good friend, Mr. Nah Wee Yang, of Knowledge Method, Singapore.

Version Control

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About the Uruk Guides Trilogy

This guide is part of a trilogy of complementary references published by Uruk Project Management. While each guide stands alone and can be used independently, they are designed to work together as a complete ecosystem for building, implementing, and understanding tailored project management methods.

The three guides are:

1. **Guide 1: Value Delivery Methodology – How to Build Tailored Methods** – The strategic blueprint. Explains the methodology principles and the 10-step tailoring model.
2. **Guide 2: Value Delivery Methodology – Stage Deliverables and Gates – Templates** – The tactical toolkit. Provides the copy-paste-ready templates for stage deliverables and gates. You can use as-is or modify to fit your context.
3. **Guide 3: Project Management Guide and Terminology** – The definitive reference. A comprehensive glossary of all project management and Uruk Framework terms, acronyms, and core concepts.

These guides are hosted on the UrukPM website, Knowledge tab, Tools & Templates section: <https://urukpm.com/knowledge/tools-templates/>.

Please note that in the Knowledge tab, there are numerous other resources available for you that we are not listing here, although they are relevant to the Value Delivery Methodology. We are maintaining the focus on the three most important guides that support the **Strategy to Results™** series.

Relation to the Strategy to Results Series:

These guides directly supplement **Book 4, Delivering Value**, which details the **Value Delivery Methodology (VDM)™**, and the **In Practice sub-series (Books 5–7)**, which apply these tailored methods to specific project classes and programs. They translate theory from books into actionable, downloadable resources and clear definitions you can immediately apply in your organization or by using our software solution, Stratija™.

For the recommended reading order and a comparison of the three guides, please see the next section, "*How to Use These Guides.*"



How to Use These Guides

These three guides are companions to the Uruk Project Management **Strategy to Results** series—specifically supporting Book 4, **Delivering Value** (which details the Value Delivery Methodology) and the In Practice sub-series (Books 5 through 7).

While they are designed to be referenced independently, they form a cohesive ecosystem for building and applying tailored project management methods. Here is how they relate:

Guide	Focus	Best Used For
Guide 1: Value Delivery Methodology – How to Build Tailored Methods	The “Why” and “How” of tailoring. Explains the two core principles, the five significant variables, and the 10-step model for designing your own method.	Understanding the logic behind customization and defining the structure of your project life cycle.
Guide 2: Value Delivery Methodology – Stage Deliverables and Gates – Templates	The “What”. Provides the actual copy-paste-ready templates for stage deliverables (e.g., Project Brief, PDP) and stage gates for all project classes (Micro, SSP, MLP, and Programs).	Building the actual content of your tailored method. Use this when you reach Steps 7 and 8 of the Tailoring Model.
Guide 3: Project Management Guide and Terminology	The “Definitions”. A comprehensive glossary and reference for all Uruk Framework terms, acronyms, and core concepts used across the guides and the Strategy to Results series.	Clarifying ambiguous terms (e.g., Phase vs. Stage, Estimate 1 vs. 2) or cross-referencing industry-standard equivalents

Recommended Reading Path:

Ideally, you should start with the book **Delivering Value**. However, if you have not bought that book, then follow this path.

1. Start with **Guide 1** (this one) to define your project classes and life cycle.
2. Use **Guide 2** to populate the stages with the appropriate templates and gates.
3. Keep **Guide 3** open as a reference to ensure consistent terminology across your organization.

We must emphasize that Guide 3 is not limited to the Value Delivery Methodology or the Uruk Framework. It is a terminology guide with hundreds of terms that project management practitioners need and use.



Note: These guides are published under Creative Commons (CC BY-NC-ND 4.0) and are meant to empower you to build your own methods. If you prefer a digital, automated approach, the logic described here is fully embedded in Stratija that we are currently building. Please check with us or our website for the latest status of Stratija.



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Overview

Introduction

This guide supplements the Uruk Project Management **Strategy to Results** series, primarily Book 4, **Delivering Value**, and the **In Practice** sub-series (Books 5 through 7).

Book 4 explains the **Value Delivery Methodology (VDM)** in detail: all stages, stage deliverables, and stage gates, and introduces the two core principles that any genuine method, tailored or not, must respect. This guide expands on the second of those principles, explaining how to design and build the customized, tailored methods that fit your organization's context.

Books 5 to 7, the In Practice sub-series, apply the tailored methods described in this guide to different classes of projects and programs.

This guide is also a companion to *Value Delivery Methodology – Stage Deliverables and Gates – Templates*, which provides the actual deliverable templates referenced throughout the tailoring process described below.

Further, we are also using the content of this guide to develop the *Tailored Method Builder* (TMB) process in **Stratija**. Stratija is a comprehensive and integrated software solution built on the Value Delivery Methodology (VDM) and the broader **Uruk Framework™**. The TMB allows a user to design their own methods based on our guidelines and established governance.

Why this Guide

In project management, we have common concepts and practices across most application areas and types of projects. For example, all projects must have a life cycle, stage deliverables (outputs), and stage gates (decision points); *see the six components in Part A, The Knowledge Foundation (and Figure 1)*.

The concept of using project management processes to manage a stage also applies to most, if not all, scenarios. However, the project life cycle and some practices might vary from one sector/domain to another. As a result of these differences, we need tailored methods. We emphasize that all tailored methods will share core concepts in line with these statements.



Part A. The Knowledge Foundation

Value Delivery Methodology

The work on the knowledge foundation started in 2007, leading to The Customizable and Adaptable Methodology for Managing Projects™ (CAMMP™), version 1, and later versions 2 and 3. We documented version 3 of CAMMP™ via a [CRC Press](#) book, *Project Management Beyond Waterfall and Agile*, published in December 2017. Later, the work on our software solution led to improvements, which we document via the Strategy to Results series, Book 4, **Delivering Value**. **Delivering Value** is now the official source for Version 4 of the **Value Delivery Methodology (VDM)**.

The VDM is founded on two core principles and six core components.

The Two Principles

At Uruk, we advocate that a project management methodology must be grounded in two core principles:

1) Vision to Value (V2V)

We often use the terms vision to value and vision to success interchangeably, since in the Uruk Four Dimensions of Project Success™, the fourth dimension, objectives success, means captured benefits/achieved value.

The most essential concept, the cornerstone of what we advocate, is that projects are organizational investments. Project owners initiate these projects in response to a need (threat or opportunity) and anticipate deriving benefits and value from them. Therefore, we do not look at projects from a limited technical perspective (charter to output, like Level 3¹), a stage (implementation, execution, or development stage; like Level 2), a service provider (vendor, contractor), or a project manager (or sponsor) view. Accordingly, this perspective is relevant to project owners. The project owner is the organization

¹ To learn more about the **Five Levels of Project Management Mandate™**, you can access a document on our website: <https://urukpm.com/download/project-management-levels-and-the-project-manager-role/>.



launching the project as a change initiative and will reap its benefits.

In line with the cornerstone, we present this information by considering a project life cycle (PLC) that covers the entire project from ideation (vision) to PLC closure, which would happen post-initial operations. Therefore, the Value Delivery Methodology covers the whole project life cycle and integrates project management with business, governance, product, and operations management. Accordingly, the first principle is that value delivery is about the full project system, from vision to success (benefits). *Vision to Value (V2V) is a concise way to express the same principle.*

The first principle is that value delivery is about the project, from vision to value.

2) Diversity of Projects

Project management practices are not uniform across domains, project types, or classes. The project management levels concept, discussed in other documents² is an example of the lack of uniformity. Therefore, to respect the diversity of the practice, we must tailor appropriately, starting with the Standard Model and ending with Tailored Methods that fit the organization's context and the project. Notice here the shift from methodology to method. We use "methodology" to describe the methodological process and life cycle, whereas "method" is bespoke and fit for purpose.

Tailoring includes considering many variables such as industry, project type (capital project, technology project, etc.), project class (size, complexity, degree of innovation), and development approach (iterative, incremental development or sequential development).

The Two Core Principles: 1. Vision to Success: Projects are investments. 2. Diversity of Projects: Respect the diversity of practice through tailoring.

We follow these principles as we build and enhance **Stratija**.

² See this video: https://youtu.be/MQc_w5SZF7o, also see **Guide 3, Project Management Guide and Terminology**.

The Six Core Components

In line with the first principle, we define a project management methodology as having six core components. These are:

1. Project life cycle
2. Phases and stages
3. Stage management processes
4. Stage deliverables (output)
5. Decision points (stage gates)
6. PM supporting actions

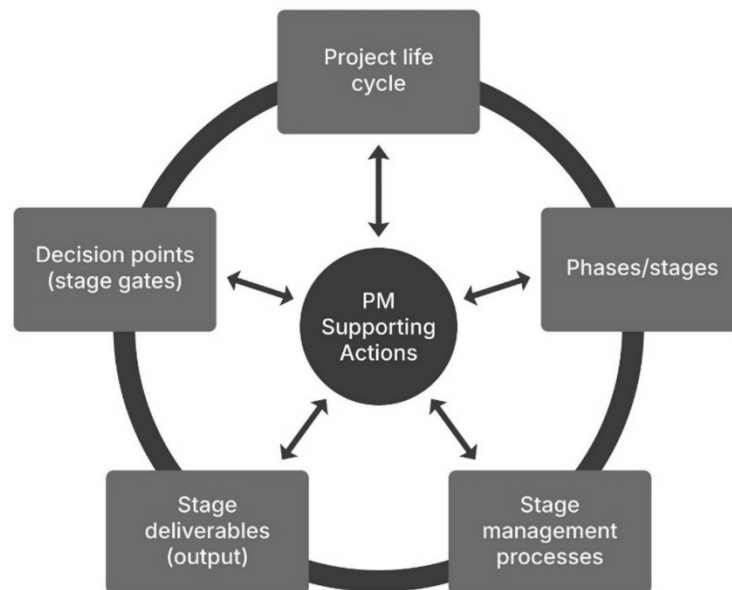


Figure 1: The Six Components of a Project Management Method

We will elaborate on this concept in the Design of Tailored Methods section. However, for a deeper understanding of this concept, we invite you to view this video: <https://youtu.be/SiUkQrHQAHY>.



Part B. Why Do We Need Tailoring?

Tailored methods are essential in project management because they allow organizations to customize their approach to fit specific project needs and contexts. Here are the reasons why tailored methods are imperative (the following is from [Uruk-AI](#))³:

1. **Sector and Domain Specificity:** Different sectors and domains have unique requirements and challenges. Tailored methods ensure that the project management approach aligns with the specific needs of the sector, domain, and category, resulting in more effective project execution.
2. **Project Class Considerations:** Projects vary in size, complexity, degree of innovation, and breadth of impact. Tailored methods accommodate these variations, providing more suitable guidance for managing different classes of projects.
3. **Flexibility and Adaptability:** Tailored methods offer the flexibility to adapt standard methodologies to better suit the project's unique characteristics, enhancing efficiency and effectiveness.
4. **Improved Value Delivery:** By customizing the approach, organizations can focus on delivering maximum value, ensuring that project outcomes align with business goals and stakeholder expectations.
5. **Enhanced Efficiency:** Tailored methods streamline processes and eliminate unnecessary steps, improving efficiency and resource utilization.

Overall, tailored methods enable organizations to optimize their project management practices, leading to better alignment with strategic objectives and improved project outcomes.

Part C. Designing Tailored Methods

How do we design the various tailored methods, and what is included in each?

As mentioned earlier, **Stratija** has ten methods, which represent the Uruk default tailored methods.

³ Uruk-AI is based on Uruk content and resources, and all AI-generated content has been reviewed and validated by the author.



Stratija also allows the user to build their own tailored methods, using one of our defaults as a starting point. If you choose not to use the software platform, we advise you to follow these design guidelines. It is best to perform the design work in a workshop with the relevant stakeholders.

A tailored method could be designed in a few hours if the participants have project management experience and some templates exist in the organization. Otherwise, it could be a few days.

The Essentials of Tailored Methods

Please note that the VDM uses tailored methods. The tailored methods depend on five significant variables.

1. **Project Type:** The project type is for grouping highly similar methods, but might still have some uniqueness. Such as capital projects, technology projects, etc. These are often linked to industry and domain. There could be hundreds of methods if we were to include them. With **Stratija**, once we go to market and grow, we could develop various methods to include in the platform library.

The project type has three variables: Sector⁴, Domain⁵, and Category⁶ (*Please read the footnotes.*) The three levels ensure that the methods are unique to each project type (see the *Project Type* box in Figure 2). An alternative would be to use a few general types, such as Facilities, Technology, Development (NGOs), and General Projects, then develop further tailoring as needed.

2. **Project Class:** Within a type, it is also essential to consider the project class. The class consists of size, complexity, degree of innovation, and organizational impact. At Uruk, we have defined five classes: Micro Projects (MiP), Small-Simple Projects (SSP), Medium-Moderate (complexity) Projects (MMP), Large-Complex Projects (LCP), and Megaprojects (MP). Alternatively, you can classify projects using a scale of 1 to 5, A to D, etc. We must stress that the project class must align with the organizational context and project type. What we mean here is that a \$1 million project

⁴ A sector refers to a significant category of industries, such as capital projects, government projects, technology projects, academic projects, and the development sector. We also use general projects as a catch-all for other sectors.

⁵ A domain or industry is a subset of a sector. For example, we could have oil and gas, utilities, energy, factories, and other types of facilities in capital projects. Within technology, we could have infrastructure, software, or hardware. The same applies to different sectors and domains.

⁶ A category might not be needed for some sectors and domains. We include categories to cover another level below the domain for further filtering and specialization. For example, within technology >> software >> we could have web development, app development, or SaaS products.



Figure 2: Tailored Methods: Significant Variables

in the capital sector (facilities) could be considered micro or small-simple. In contrast, a project of the same cost could be a large and complex web development project.

3. **Development Approach:** This is basically about how the team will develop the product of the project. Typically, we can use either iterative/incremental development (IID), or what some call Agile Development, or sequential development (SD), which some erroneously label as a Waterfall. We are not covering these variations in this document.

Stratija MVP starts with ten default methods with different classes and development approaches.

4. **Stage Management:** This variable is highly dependent on the project type and class. For simple, low-intensity, low-resource stages, the team can use the **Simplified Stage Management**. For significant stages, the team might find it more appropriate to use the **Advanced Stage Management**. We cover both of these in the companion **Guide 2: Value Delivery Methodology – Stage Deliverables and Gates – Templates** (Parts E and F).
5. **Operations Mode:** This variable indicates whether the project output leads to a product's operations. If there are operations, then that would require operational readiness preparation. Depending on the nature of the project, this might also require significant organizational change management expertise. For example, an initiative about AI Transformation could be massive and require focused and ongoing organizational change management to minimize resistance and enhance the chance of success.

The Tailoring Model

Expanding on the essentials, the following section includes the primary components relevant to the tailoring model. Numerous other items are required to build a method, but we are not including those details here. We will share additional resources where possible.



Please note that the steps in this section are for one specific method. Repeat the process if you want to develop multiple methods for different types.

The Uruk 10-Step Model for Designing Tailored Methods is as follows.

1) Project life cycle

The starting point is to develop the appropriate project life cycle. The design must include the number of phases, stages, stage deliverables, and stage gates. The sub-steps include:

- Define the starting point of a project. We recommend that the starting point be the triggers for the change.
- Define the end of the project life cycle (PLC).
- Subdivide the PLC into logical stages.
- What should be the primary output of the stage? Do not worry about the content; that is a later step.
- Ideally, you should also identify the decision points (stage gates).

We share a few PLC examples later in this guide (See Part D, *Project Life Cycle Examples*).

2) Names

You can accept the Uruk default names of the various documents and stages or change them to suit your requirements.

3) Stage sequence

Define whether some of the stages will be sequential (with minor overlaps), in parallel, or will have significant overlap. A few questions to consider here:

- What will trigger closing a stage?
- What will trigger unlocking the following stage?
- Are the dependencies mandatory or optional?

The above is partially related to the fast-tracking concept, which is outside the scope of this resource. We think you can find many online references about fast-tracking.

4) Stage management

The Uruk Framework and Stratija use a modified approach to the PMI/ISO process groups' concept. You



can follow the PDCA⁷ approach, the PMI/ISO process groups, or the Uruk Processes⁸. We must stress that the model you choose must be repeatable at every stage. In other words, you must manage every stage. Also, you can simplify the process groups, as needed⁹.

5) Stage gates

The decisions here include whether some of the stage gates are optional and if some of the stage gates allow provisional acceptance. Further:

- Will you be using a gatekeeper?
- How about defining the criteria for these gates?
- What stages will a gate lock and open?

6) Project sponsor

The choices are:

- You have a sponsor,
- Do not have a sponsor, or
- You could have the sponsor role for some stage gates.

A relevant question here would be who (what position or role) the best fit for the sponsor role is. We strongly recommend using a sponsor for every project or program.

7) Stage deliverables templates

Next, you must design the stage deliverables. This is the most time-consuming part of the design.

Every stage deliverable for every tailored method has work packages and other topics. You must define these deliverables and decide on their content (outline). Also, determine whether each item (or work package) will be optional or mandatory.

*The “Value Delivery Methodology – Stage Deliverables and Gates – Templates” is a related guide with all the templates we use for the various stage deliverables per the value delivery methodology. With this additional resource from our website, you can start with our templates and their content, then **copy**,*

⁷ PDCA = Plan, Do, Check, and Act.

⁸ For these, please refer to the other guide, **Value Delivery Methodology – Stage Deliverables and Gates – Templates**.

⁹ We must emphasize and remind you that possibly everything can be tailored.



paste, and modify them as you see fit.

8) Stage gates templates

The mentioned resource in Step 7 also covers stage gates. Most stage gates usually have an identical template with minor changes for a couple of critical gates, like the final approval gate. The main difference is the stage gate criteria we mentioned in Step 5.

9) Development mode (approach)

One of the vital differences in managing projects is the **product development approach**, which is significant.

We realize that most of a project's effort and cost are required in the implementation stage, where the team develops the project product. Therefore, the vital question is this: Can you deliver this product in pieces (iterations or increments) where every piece is a “working product”¹⁰ If yes, the team can use Iterative/Incremental Development (IID). If not, and the product must be completed in one handover, we must use Sequential Development (SD).

10) Operations mode (approach)

In some situations, the project might be done by a service provider not involved in the operation of the product. Also, some projects might not require the operations of a product or system. As a result, the project life cycle will not include the operational readiness and initial operations stages. Therefore, we must consider this variable in the design and selection of the tailored method.

Comments

We advise you to build a tailored method, even if it is rough. Then put it in use, collect feedback, and improve it. Once your team and organization are comfortable, repeat the process to create additional methods.

¹⁰ Working Software (working product) is the vital differentiator. This is linked to the idea of adding value to the customer. Therefore, we believe the iterations or increments must be completed and handed over to the customer for beneficial use.

Part D. Project Life Cycle Examples

In **Stratija**, we use different tailored methods. The following are examples of typical and generic methods. These are for general projects and not tailored to a specific type. The tailored methods (for the other sectors and domains) could be similar but with different names or have more or fewer stages.

For example, we were collaborating with a university on their students' capstone projects. We used the small-simple model and removed the operational stages since operational activities are not needed in these student projects. We also modified some of the deliverables.

Another example: for capital projects, the output of the definition stage could be called Preliminary Engineering Design or Front-End Engineering Design. However, in the generic model, we call that deliverable the Project Detailed Plan.

Selecting the Right Project Life Cycle Model

The five significant variables you learned about in Part C: Project Class, Development Approach, Stage Management, and Operations Mode determine which life cycle model best fits your project.

Use the decision flow below to navigate from your project's characteristics to the appropriate model. Once you have selected your model, refer to the corresponding diagram and the detailed templates

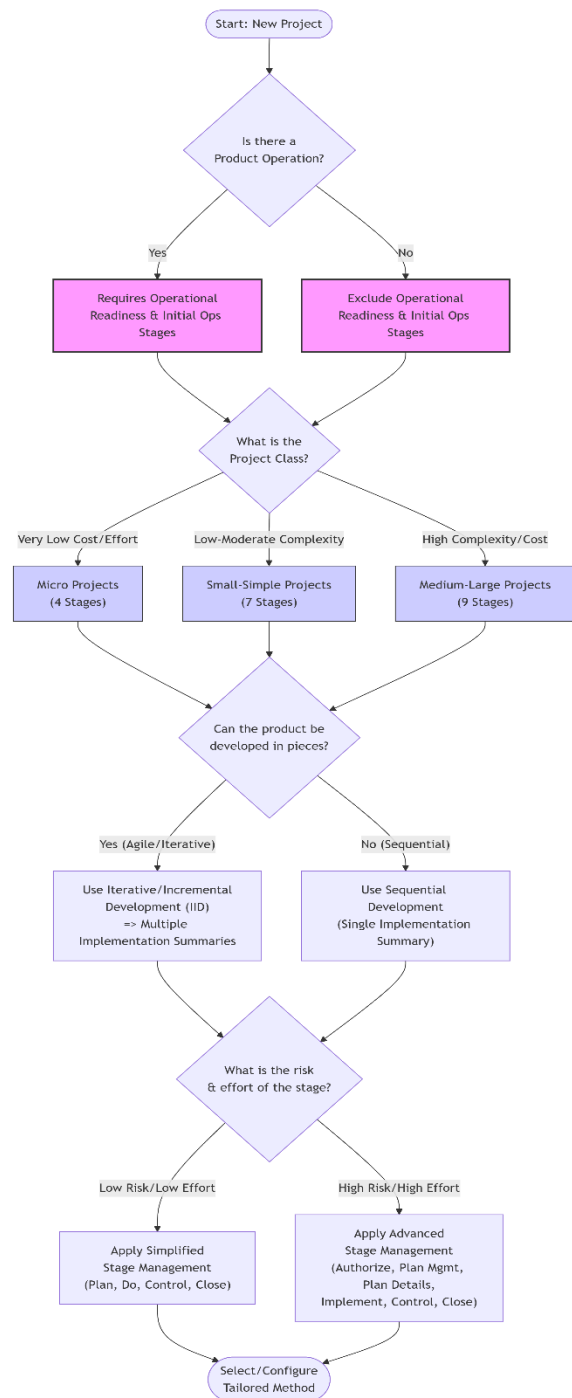
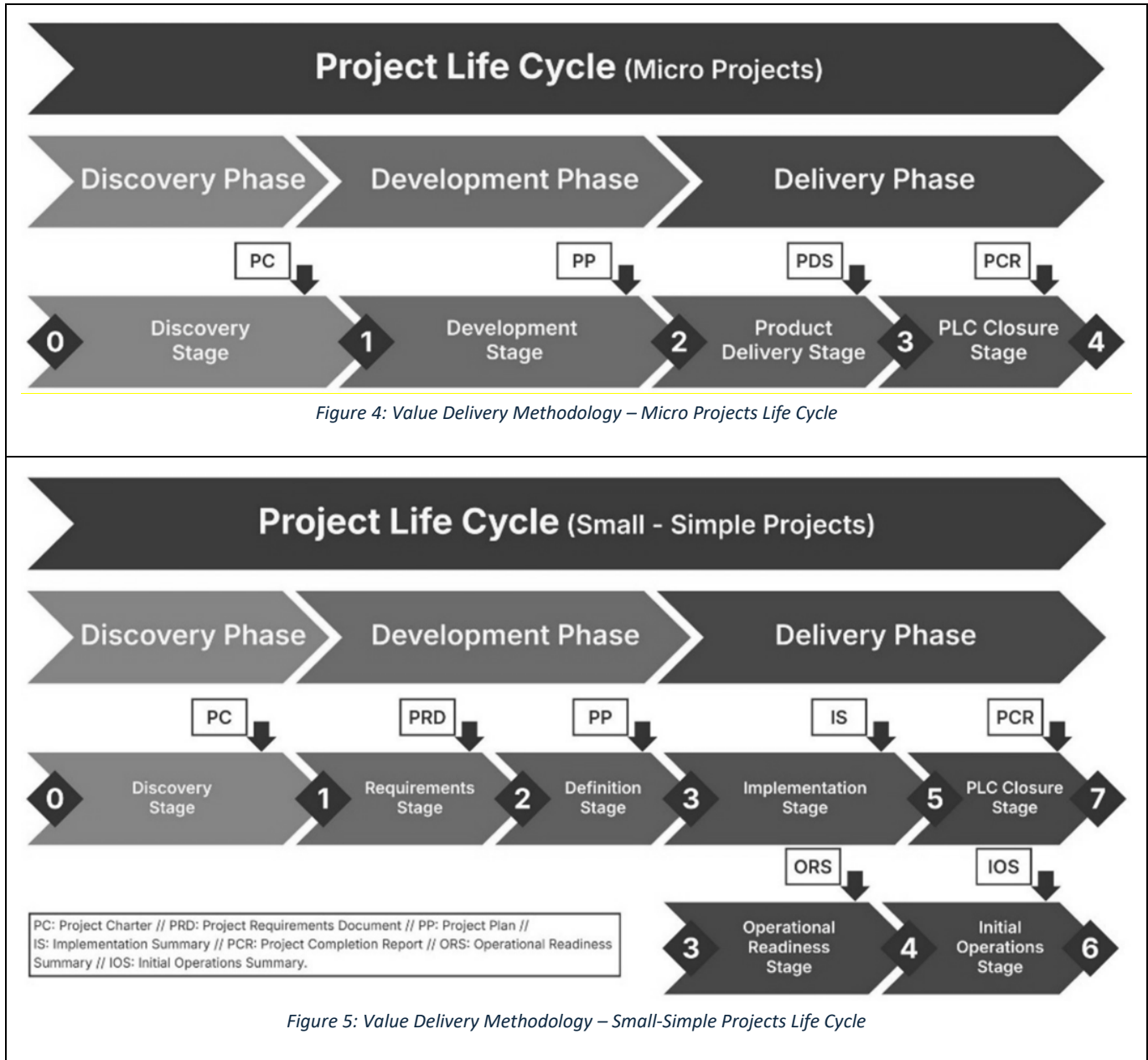
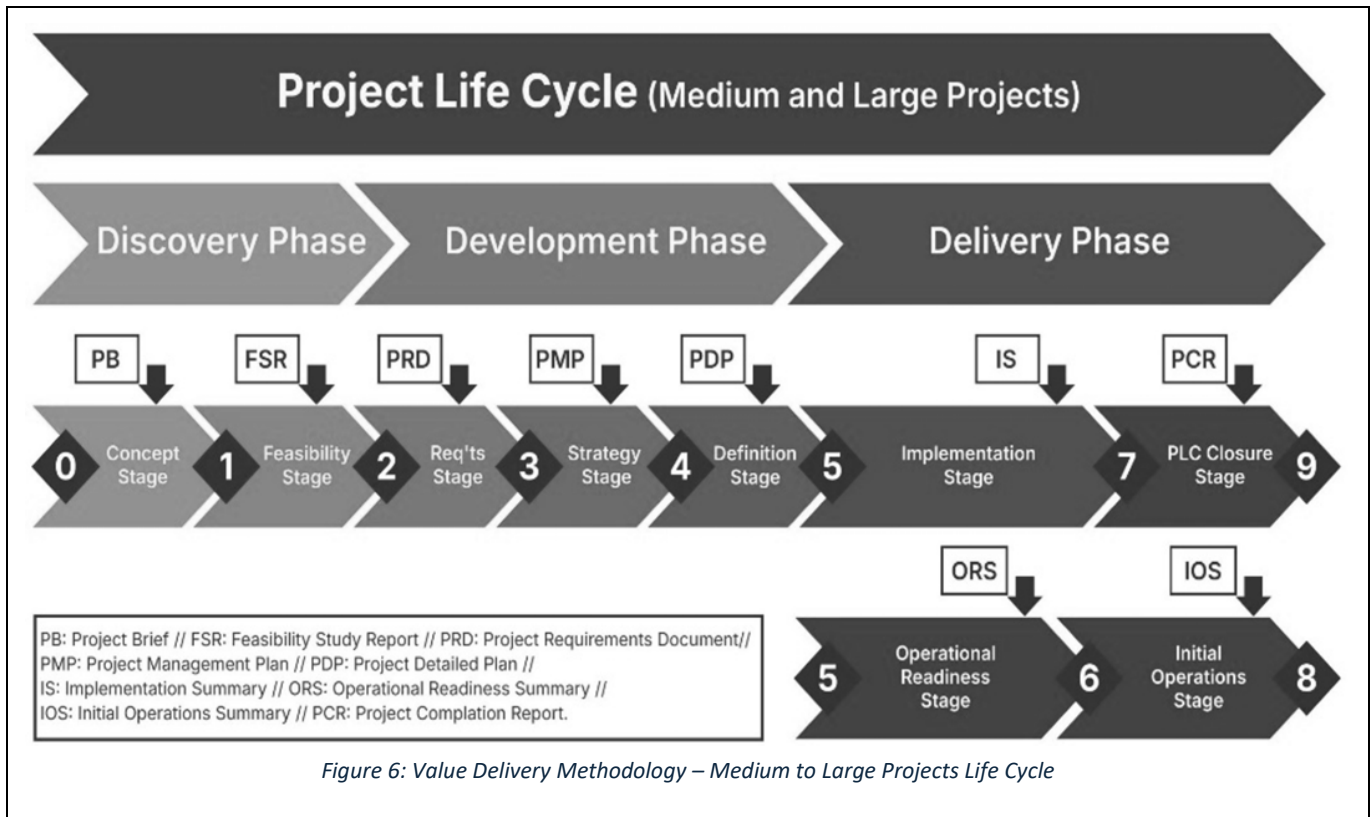


Figure 3: Designing a Tailored Method

in **Guide 2** to build your method.





The project life cycle is similar for medium-moderate and large-complex projects, so we have one model. The differences are often in the level of detail and how each stage is managed.

Part E. Other Relevant Information

Related Services

At Uruk, we try to provide you with as much information as possible so that you can do things on your own, especially if your organization has professionals with the right level of expertise but not enough time. Here, we provide you with guidance on building a tailored method. We also shared a link to our website to download the relevant templates and instructions.

However, if you need help, we can collaborate with your team to build a suite of tailored methods for the different divisions. We can also create them for you and include them in **Stratija**. Further, we have an excellent and efficient workshop: <https://urukpm.com/learning-and-development/apm-workshop/>. The workshop offers insight into the value delivery methodology and how to apply it in the real world and



YOUR unique context. The workshop can be delivered in a condensed format at your site or through an 11-session course, spread over 11 weeks: online, in-person, or hybrid.

Stratija

We use the value delivery methodology and tailored methods in Stratija. The approach we share in the Designing Tailored Methods section aligns with our strategy in the software solution.

In Stratija, we will include numerous built-in, tailored methods to make it easier for organizations that have not developed their internal processes. When users from these organizations access the platform, they should be able to find a method close enough to their needs. It might not be a perfect fit, but it's much better than starting with nothing. On the other hand, if an organization has its own methods, we can readily build them on the platform, enabling them to use technology quickly without investing in developing software. Furthermore, we can collaborate with you to create or modify a tailored method unique to your context.

Additional Resources

Please note that we continue to add articles, papers, tools, and templates to our website (<https://urukpm.com/>). However, sharing the direct links for the relevant sections is easier.

1. The Uruk Framework: <https://urukpm.com/uruk-framework/>
2. The Uruk Knowledge Portal: <https://urukpm.com/knowledge/>
3. Uruk-AI: <https://urukpm.com/uruk-ai/>
4. Uruk Services: <https://urukpm.com/services/>
5. Uruk Learning & Development: <https://urukpm.com/learning-and-development/>
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