STRATEGY TO RESULTS

GOVERNANCE & METHODOLOGY • IN PRACTICE

VALUE DELIVERY METHODOLOGY

Stage Deliverables and Gates

TEMPLATES

DISCOVERY • DEVELOPMENT • DELIVERY

Every Stage. Every Gate. Every Deliverable.

A Companion Resource for Book 4 through Book 7

URUK PROJECT MANAGEMENT

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Front Matter

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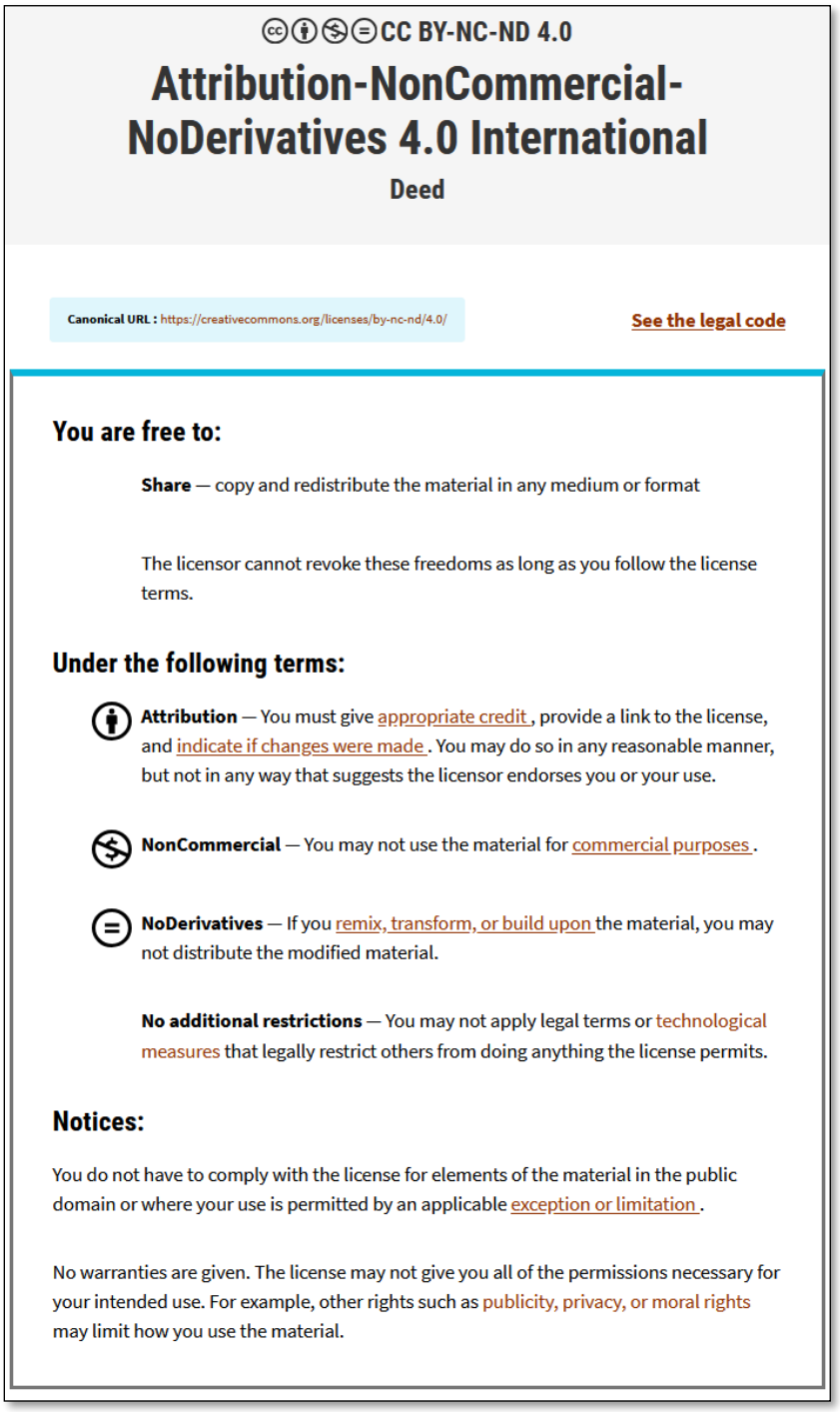

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The cover illustration is borrowed from Book 4 of the Strategy to Results series, and it is the artwork of a good friend, Mr. Nah Wee Yang, of Knowledge Method, Singapore.

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 the Knowledge tab includes many other resources we are not listing here, though 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 on **Stratija**[1].

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

[1] Stratija is a digital solution, a software platform, based on the VDM and the Uruk Framework. In other words, it is a practical and comprehensive solution that allows organizations to seamlessly implement the Uruk Framework to manage their entire portfolio, including its projects and programs.

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** 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.

Further, we are also using the content of this guide to develop **Stratija** as a comprehensive and integrated software solution built on the Value Delivery Methodology (VDM) and the broader **Uruk Framework**.

Tailored Methods

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

- **Project Type**: Such as capital projects, technology projects, etc. These are often linked to industry and domain. Tailoring based on the project type is outside the scope of this document. 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.
- **Project Class**: This is a categorization system that classifies projects based on size, complexity, and other variables. This variable has the most noticeable impact on the project life cycle stages. There are five default classes: Micro, Small-Simple, Medium-Moderate, Large-Complex, and Megaprojects. We also use the VDM for Programs. We cover these in Parts A to D. At this time, we are not including the deliverables for the Megaprojects class since most of them are similar to MLP.

- **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), what some erroneously label as a Waterfall. We are not covering these variations in this document.

- **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 Parts E and F, respectively.

- **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 change management to minimize resistance and enhance the chance of success.

A related reference, available on our website: https://urukpm.com/knowledge/tools-templates/, is **Value Delivery Methodology – How to Build Tailored Methods**, which is the first guide in this trilogy.

Please note that some of these deliverables apply to more than one tailored method; we will show the applicability of each deliverable with the table caption.

Part A. Medium to Large Projects (MLP)

Introduction

The Medium to Large Projects Life Cycle is suitable for the Medium-Moderate complexity class and the Large-Complex class. The main difference between the two classes is not the PLC; it is primarily the stage management processes within each stage.

We start with this project class since this is also the **Standard Model**.

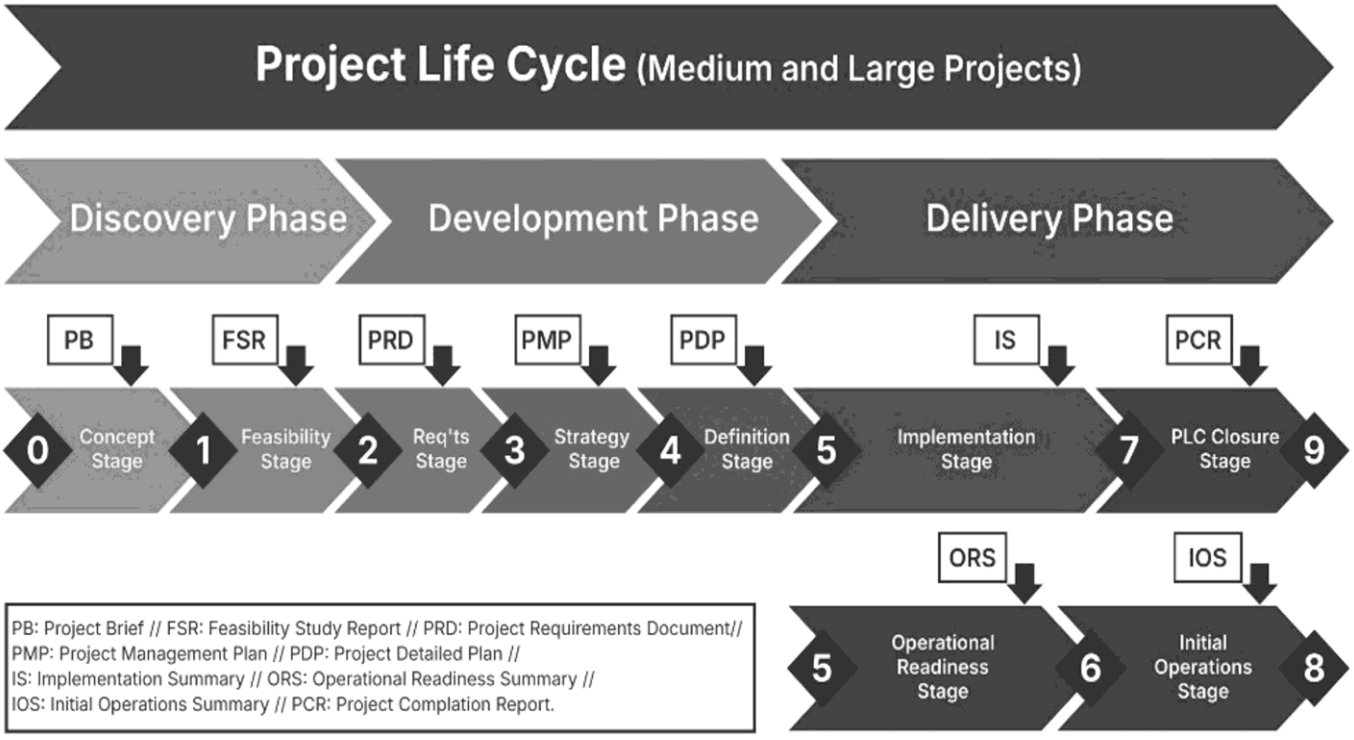

Figure 1: VDM – Medium to Large Projects

Discovery Phase, Concept Stage

Overview

The Concept Stage is necessary to develop the business case, establish the product vision, and define the desired project outcome and benefits. The primary output of this stage is the *Project Brief*. The purpose of the stage gate is to authorize the next stage. It is also necessary to ensure strategic alignment.

Stage Deliverable: Project Brief (PB)

Table 1: MLP Method, Project Brief (Concept Stage)

Topic	Instructions
Background Information	If necessary, provide the necessary information to support the project review.
Problem, Opportunity (what)	Describe the problem to solve or the opportunity to pursue.
Solution (how)	Please explain the solution, which could differ from the product description. Basically, this is how to achieve the results.
Product Description (output)	Explain the final project output. These questions could help with this task. • What will the project produce? • What do you want to accomplish with this project? • What will the project give the organization when done? The output means the project's product, physical or otherwise, such as a house, software, or service.
Justifications/Expected Benefits (outcome)	The project justification is related to the business case. It should cover: • Why are we doing the project? • What are the drivers and reasons for the project? • What threat are we trying to overcome, or what opportunity do you want to exploit? For business projects, the primary drivers are profit, revenue growth, cost reduction, and market penetration. However, for NGOs, the driver might be social or community needs in government or not-for-profit projects. The description concerns the project's "output," whereas the justification concerns the "outcome," the expected benefits.

Topic	Instructions
Does the project align with the organizational strategy?	This should be: □ Yes, □ No, □ Not Sure
Strategic Alignment	The methodology view is that all projects must be aligned with a specific strategic goal or initiative, either through a program or independently of one. Therefore, in this section, examine how this project aligns with the organization's strategic direction and objectives. If it does not align, explain why.
How to determine success? (measurable)	The Uruk Four Dimensions of Project Success[2]. You can establish the criteria for all four dimensions. You can modify the criteria during the upcoming stages. However, you should lock them with final project approval before the delivery phase.
Comments	The final comments by the project manager and team, if necessary.

Stage Gate: No 1, Strategic Alignment

Table 2: Stage Gate 1 (Concept Stage)

Topic	Instructions
Decision Criteria	In some organizations, they might have pre-defined criteria. In this case, the sponsor can comply with the criteria or justify an alternative. If there are no criteria, the sponsor and reviewers can add them here.
Attendees	If there are reviewers other than the sponsor, it would be helpful to list them along with their roles and contact information.
Decision Explanation	The project sponsor (and other reviewers) can briefly explain their decision if necessary.
Decision ☐ Approve ☐ Revise ☐ Hold ☐ Terminate	 Approve the stage deliverable and authorize the team to proceed. Request revisions to the stage deliverable and resubmit. Put the project on hold until management decides to reactivate. Terminate the project and proceed to close out.
Brief Record of Meeting	If there are reviewers, it might be helpful to keep a record of the essential points of this meeting.
Instructions to PM & Team	If the sponsor is to issue an instruction to the project manager for the next stage.
Date	Date of the decision, resolution of the stage gate.

[2] https://urukpm.com/uruk-framework/

Please note that this template for SG1 applies to all gates (with minor variations) and also applies to all methods (projects and programs).

Discovery Phase, Feasibility Stage

Overview

This stage could have two stage deliverables and one stage gate. The stage work leads to the *Feasibility Study Report* (FSR), and after stage gate 2, the sponsor could issue a *Project Authorization Document* (PAD) or a *Project Charter*. We cover the PAD in Part G.

Remember that the feasibility study is not a detailed plan or a management plan; it is also not a business case. It primarily assesses whether the organization can deliver the product and complete the project successfully. Therefore, we do not need intensive details in the content. Complete these considerations and evaluations with a mindset: ***What could hurt or help the project?*** In other words, this is a form of a high-level risk assessment.

Stage Deliverable: Feasibility Study Report (FSR)

Table 3: MLP Method, Feasibility Study Report (Feasibility Stage)

Topic	Instructions
Internal Cross Evaluations	This item is specific to identifying internal synergies or overlaps and avoiding duplication of effort, especially in large organizations. For example: • Is there another organizational unit working on a similar project? • What might other projects influence this project negatively or positively? • What other projects could be affected by this project?
Team Considerations	Human resources (team) considerations in the feasibility study are mostly about availability, capability, expertise, and whether the organization can perform the project work with internal or external resources. At this stage, the focus is on the initial stages since the team will update the staffing requirements for the later stages once there is project management and detailed plans. Finally, this topic is not about naming people or assigning resources to the project!

Topic	Instructions
Market Evaluations	Market evaluations are specific to the market demand and supply. • Regarding demand, did the team perform an unbiased market assessment to determine the need for the products the project will deliver? • Next, include an evaluation of the competition. These evaluations apply if the project involves releasing a new product to market or enhancing an existing one. A product could be a gadget or a service. A course, a computer application, and a consultancy solution are all products. Market evaluation is usually one of the most challenging items to assess, especially in locations with no reliable resources and statistics on market size and other factors affecting the market.
Social/Community Evaluations	These evaluations would be like market evaluations, but in this case, they are specific to social and community needs and requirements. They would apply to government, NGOs, and not-for-profit projects, and they may also apply to Corporate Social Responsibility (CSR) Projects.
Location Factor Considerations	What are the location considerations for the project, if applicable? For example, the project's location could affect its cost, quality, and other factors. This might include the territory where the organization would be providing the service or selling the new product is also vital.
Technology Evaluations	Technology evaluation concerns any technology-related matters relevant to the project. These items are not part of the day-to-day environment. For example, there is no need to mention that we need MS Project or Google Docs on the project. Instead, this would be for things like this building requiring total automation or software development based on the latest technology. The main idea is the potential risk if the project requires new or unproven technology.
Legal/Regulatory Considerations	Are there any legal or regulatory matters that might impact the project, and must we comply with them? Examples include licensing, permits, registrations, etc.
Sustainability Considerations	Depending on the type of project, we may need to consider sustainability matters. Sustainability is about the impact on society, the economy, or the environment.
Time Considerations (Estimate 1)	Time considerations include the expected project duration, project milestones, key dates, or any other time-related topic to address. Is there a time window within which the project may not be feasible? On some projects, this would be the output of an initial estimate, which we call Estimate 1.

Topic	Instructions
Cost Considerations (Estimate 1)	This section deals with the estimated total cost of the project. The project cost includes external and internal costs or internal resource hours. It is a frequent practice that many organizations do not account for their internal cost or effort, which is an organizational choice. However, we believe capturing internal costs and effort is necessary since these are actual costs to the project. If the project involves launching a new business or service, operating costs may also need to be considered at this time. This could be the output of an initial estimate, which we call Estimate 1.
Other Considerations	If there are any other items specific to the project that we did not include, this is the place to list and consider them.
Significant Project Risks	Are there any significant risks that surface early in the project? It is worth noting that the feasibility study itself is a form of overall project risk assessment since the team is conducting it to decide whether to pursue an opportunity. The team performs risk assessments for large projects while planning each stage. For small, simple projects, the team conducts a detailed risk assessment with a detailed plan for the project.
Financial Considerations	Financial considerations are specific to funding or financing the project and are not about the project's cost; project cost is independent, as mentioned earlier. Financial considerations would be required if the project is not part of the standard operating budget and needs specific funding, whether from the organization's capital or operating budget or outside financing.
Conclusion and Recommendation	This part concerns the project manager and team's conclusion on the feasibility and recommendations. If the project is only feasible within a window of opportunity or under specific conditions, this is the place to state these conditions.
How to determine success	If the success criteria were not included in the *Project Brief*, this is the time to revisit and include them.
Comments	The final comments by the project manager and team, if necessary.

Stage Gate: No 2, Initial Authorization

All stage gate templates are similar; please refer to Table 2. The only differences are:

- The purpose of the gate,
- The reviewers and decision-makers might change from one gate to another.
- At this gate, management is issuing the initial authorization for the team to proceed into the Development Phase.

Development Phase, Requirements Stage

Overview

The Requirements Stage involves a vision of the final product. In this stage, the team collects the stakeholders' input and expectations, business requirements, and any other relevant information that would help the team proceed with the project work.

Stage Deliverable: Project Requirements Document (PRD)

Table 4: MLP & SSP Methods, Project Requirements Document (Requirements Stage)

Topic	Instructions
Description of the Product	This section describes the project's product, including any additional information the team developed or gathered during the discovery phase. It elaborates on the information listed earlier, and the team should expand on the description. However, the team must be careful not to go into too much detail since the details will be part of the detailed project planning effort.
Characteristics of the Product	Explain the characteristics of the product and the required features, where applicable.
Explore the Expectations	Collaborate with the client (internal or external) (or stakeholders) to explore the customer's expectations and to transform those implicit expectations into explicit and clear requirements. Requirements are specific items we can list and itemize, whereas expectations are mostly 'state-of-mind' and not easy to document. To enhance the chance of success, a project manager cannot just depend on listed requirements but must explore the expectations. Please note that this is NOT about the expectations of the project manager. It is about the expectations of the various stakeholders, especially management.
Stakeholders' Input	It is implicit that to identify the project requirements and explore the expectations, one will need to seek the input of the different stakeholders, but we are adding this here to emphasize the need to do so and not to limit the discussions to management or the key stakeholders. We need to gather input from all relevant stakeholders, directly or indirectly. It is often the case that while collecting input, the project team will explore the expectations listed earlier.

Topic	Instructions
Alternatives Evaluations	Considering and listing any alternatives here is necessary to select the best options. We could also list some other options here for review in later stages. The alternatives could be to the project, scope, schedule, location, procurement, etc. However, we recommend not leaving any significant alternatives open beyond this stage since they could lead to disruptive changes later.
Project Boundaries	Boundaries are particularly valuable to draw and are crucial for clarifying the project and its components. In other words, what is included in the project, and what is not included?
Product Breakdown Structure (PBS)	PBS is a visual representation of the final product. It is a tool to help the team and stakeholders understand and align the product scope as the starting point for defining the project scope. Therefore, it is an input to the WBS.
Work Breakdown Structure (WBS)	The team will use a work breakdown structure (WBS) to show the work deliverables required to complete the project's output at this stage. For the project, the WBS would be high-level and have no details. However, for this stage (part of rolling wave planning), we can have information on the work and work packages.
Constraints	At this stage, the team needs to revisit the defined restrictions and determine whether some constraints have been relaxed, removed, or new ones added.
Assumptions	The team needs to revisit the assumptions, as well as the constraints, to see if they are still valid and whether new assumptions are needed.
Best Practices[3]	This stage is an ideal time during the development phase to introduce industry-specific best practices, if there are any. It is necessary to do so at this point in project life since the best practices will propose possible alternatives. In various industries, there could be many best practices to consider.
Sustainability Requirements	Depending on the type of project, we may need to consider sustainability matters.
Acceptance Criteria	Completion is different from acceptance and different from success. What are the minimal requirements for management or the client to accept the project's product? Is it possible to reject the product of the project and under what conditions? What would be the legal ramifications if the client's organization did not accept the product of the project?[4]
Success Factors	Review and refine the success criteria if necessary. Identify the factor that can contribute to achieving success.

[3] We do not like the term Best Practices since it is best for whom? We prefer leading practices. However, for capital projects, organizations like the Construction Industry Institute (CII) use the term and define 17 best practices.

[4] This last point is applicable if the work is done under a contract.

Topic	Instructions
Comments	The Project Manager and Team can add anything they want to say to expedite the decision-making process.

Stage Gate: No 3, Stakeholder Alignment

All stage gate templates are similar; please refer to Table 2. The only differences are:

- The purpose of the gate.
- The reviewers and decision-makers might change from one gate to another.
- For this gate, it is critical to ensure alignment of the stakeholders. It is worth noting that the team can readily deal with changes up to this point since their impact is still low. However, as the work proceeds into the other stages, the impact of change increases and can be highly disruptive and costly. Hence, there is a need to ensure alignment of the relevant stakeholders here.

Development Phase, Strategy Stage

Overview

We often hear feedback from those who see the image of the model without content. They are confused by a strategy stage in the middle of the project life cycle. Therefore, we must stress the following:

- This is not the organization's strategy, which is part of strategic planning and outside the project.
- In the Discovery Phase, especially with the concept stage, we define the business case, a form of the project strategy.
- You conducted the feasibility study during the Discovery Phase, which addresses many variables related to the project.
- Therefore, this strategy stage (as you will see in the content) addresses the strategy for proceeding with the project from this point onward, along with developing the *Project Management Plan*. Why now? From this point onward, expenditure will increase rapidly, often exceeding what is allowed in operating budgets.

Stage Deliverable: Project Management Plan (PMP)

Some organizations might prefer to split the strategy section from the *Project Management Plan*. The PMP has four sections.

Table 5: MLP Method, Project Management Plan (Strategy Stage)

Topic	Instructions
Section 1: Strategy	
Project Management	The project management strategy is about the general organizational approach to managing the project. It is a set of statements that establish the general project management guidelines. The word strategy represents high-level thinking or approach, not a detailed plan.
Delivery	The delivery strategy may not apply to some projects because they may not require any special circumstances. The strategy is mostly related to the implementation of the work and the focus on high-level thinking on how to do the job—in other words, how to manage the delivery phase of the project and go from this point to completion. An example would be to use modular construction on a capital project. Another example might be answering this question, "Should we do the work using our resources or outsource it?"
Product Development	How will the team build the product? Here the options would be Iterative/Incremental Development (IID) or Sequential Development (SD).
Procurement	Like the project management strategy, the procurement strategy is a set of guidelines for procuring goods and services to meet the project requirements. In some cases, the procurement strategy could significantly impact the project development effort, hence the need to address it at this stage of the project lifecycle. For example, • Would the organization depend on local purchasing or global sourcing? • Will you use local contractors or global contractors? Once again, the focus is on strategy, not a detailed procurement plan.

Topic	Instructions
Industry Leading Practices	Guides such as those from PMI®, IPMA®, or ISO are about good or standard practices. However, there is excellent value in implementing best practices[5] on projects that would help enhance performance and the chance of success. These practices require domain experience since these practices in capital investment projects are likely different from those in software or pharmaceutical projects. For example, Kanban or Scrum might be considered good practices in software development, whereas constructability is a "best practice" for engineering and construction projects. Consequently, in this part of the strategy section, an experienced team can identify the industry-leading practices for their domain and decide if they can apply all of them and, if not, what could be effectively applied to the project. For capital projects, the Construction Industry Institute (CII) is the leading authority on best practices in this domain.
Sustainability	The team shall consider the sustainability strategy at this stage. GPM Global includes various aspects that can be incorporated here, first as a strategy and then in the "how-to" section below; it would be expanded as part of the PMP or an independent sustainability management plan.
Section 2: "How to" Section	
How to Define the Project?	The definition stage (the next stage) focuses on detailed project planning and leads to the *Project Detailed Plan* (PDP). Notice the use of the term "how to define" and not define. What is the significance of these words? When asked "how to define," one is only answering the how-to! The answer might be, for example, "will need to survey our customers" or "will hire a landscape architect to design the garden." On the other hand, when asked to "define," this would be the survey's and garden's actual design, respectively. The question here—how to define—is simplified and summarizes all the items necessary to finalize the definition package. For example, how to determine the project's scope, develop the schedule, manage risks, ensure proper human resources, etc.
How to Manage the Project?	The previous point depends heavily on the project type and domain; therefore, it must include quite a bit of detail, whereas this section could be concise if the organization has a proper project management organizational system. In that case, this section could be limited to "follow the organizational processes and methods." Without an organizational system, the project manager must explain his or her approach to managing the project to gain the sponsor's and management's acceptance. As with the previous point, there could be many questions here. For example: "Who has the power and authority to approve x, y, or z?"; "How many and what positions are required for the project management team?"

[5] The author prefers the term industry-leading practices since what is best in one environment might not be the same for another environment. The difference in the terms could be semantic to many professionals. However, some organizations like CII (Construction Industry Institute) use the term 'best practices', whereas IPA uses Value Improving Practices.

Topic	Instructions
How to Control the Project?	Some might prefer to merge 'manage' and 'control,' which would be acceptable. However, if we separate, these are some of the relevant questions: • How to monitor project performance? • How to ensure proper project control? • What is project control? Project control encompasses cost control, scope control, and time (schedule) control, among other project management functions. A better term to use is performance management; this would directly indicate project performance, which we check, or measure compared to the plan. Remember, control happens from the beginning[6]; the idea and project are brief and remain active until the end. However, control in the earlier stages is mostly qualitative, but as the project moves into the delivery phase, control will be extensive and quantitative, hence the need to focus on "how to control" now.
How to Manage Change on the Project?	The second essential control component is the project's change management, which is specific to any proposed or approved changes from the plan. Change management is like control—it should extend from the start of the project but become more focused in the upcoming stages.
How to Get Ready for Operations?	So, how do we get ready for operations? Typically, operations personnel perform the work related to operational readiness with the support of the project manager and team. The primary consideration at this stage is to decide how to perform this work. During—in parallel to—the implementation stage, the project sponsor should form an operations team. This team would establish the necessary procedures, guidelines, training, and anything else needed to prepare for operations. One final statement here: At this time, the project team, sponsor, and management should agree on whether a pilot (initial operations) period would be required. If necessary, the team must also address how to oversee the pilot or initial operations.
How to Close the Project?	As the project moves into the implementation stage and progresses toward completion, a significant amount of work needs to start happening to deliver the project to the client (internal or external), and the team must also begin planning for project completion and closure. Some organizations do not put effort into project completion and closure; they view it as one of the least essential project activities. There is no glory after the work is complete. However, from a strategic perspective, the work is incomplete until the team formally publishes a *Project Completion Report* or a *Project Closeout Report*.
Section 3: The People Aspects	

[6] The Uruk Framework, https://urukpm.com/uruk-framework/, includes two solutions relevant to project control: The Four Control Reference Points, and The Six Steps of Performance Management.

Topic	Instructions
Project Management Team (PMT)	The project management team (PMT) consists of the project manager and other members whose job is to support the project manager in managing the project. These could include cost and schedule specialists, project engineers, planners, and other resources. At this time, the PMP will consist of all these resources, functions, numbers, project timing, and reporting relationships. Therefore, the plan must include what is required for each stage regarding numbers, positions, and experience level.
Extended Project Team (EPT)	The project technical team comprises the 'functional/technical' members who will perform the project work. This section expands on the previous section's project organization chart, staffing plan, and RACI chart. For smaller projects, we could also merge this and the last section into one section. At this stage, the focus is on identifying the technical/functional team members needed to work on the PDP. During the PDP development, the PMT will update the project team with a focus on the implementation team.
Project Stakeholders	The project manager and team need to review the list of stakeholders, understand each one's role, how they affect the project or are affected by the project, and how to manage the relationship. It is critical to keep the stakeholders informed and involved where necessary.
Project Communication Plan	Organizations need people to manage projects; projects impact people, and everyone affected needs to receive or pass information. The PMP is the tool the project manager will use to help establish the proper mechanism for effective communication. Planning starts with identifying the communication requirements for the project's various stakeholders, then providing the necessary answers regarding who communicates with whom, what information to share, how often, what format, and other relevant questions. The project team must carefully address the needs of non-team members and all other stakeholders.
Section 4: Estimate 2	
Project Schedule (Estimate 2)	At this time, the project management team will have a better understanding of the project. Therefore, they should develop a schedule or update the initial one from the feasibility study. This schedule might lead to changes in the project completion date. It would be beneficial to use a tool. It is worth noting that this schedule is not the final one; the final schedule will be part of the Estimate 3, which the team will develop in the Definition Stage.
Project Cost (Estimate 2)	The same goes for the project cost. With the project requirements and project management planning effort in place, the team will be able to update the project cost estimate.

Topic	Instructions
Time-Phased Budget (TPB)	Once the project cost and time estimates and the high-level PBS and WBS are complete, the team can develop the initial time-phased budget reflecting the project budget over time. This information is also helpful for: • Calculating inflation cost if the project lasts for an extended period—say, over six months or a year. • Developing cash-flow curves and expectations. • Calculating investment costs (loans or bonds) if required. The time-phased budget included with Estimate 2 is still considered preliminary. The final TPB will be part of the Project Detailed Plan.
Performance Management Baseline (PMB)	The team can generate the *Performance Management Baseline* (PMB), which is the planned value curve, per the earned value management terminology. The PMB included with Estimate 2 is still considered preliminary. The final PMB will be part of the Project Detailed Plan.
Comments	The Project Manager/Team can add anything they want to say to expedite the decision-making process.

Stage Gate: No 4, Project Management Plan Approval

All stage gate templates are similar; please refer to Table 2. The only differences are:

- The purpose of the gate.
- The reviewers and decision-makers might change from one gate to another.
- For this gate, verify if advanced funding is required.

Advanced funding might be required if the definition stage requires more funds than can be allocated from the operating budget or if the stage work will be outsourced. Therefore, the stage gate template will include the following additional content.

- Is there a need for advance funding at this stage? ☐ Yes ☐ No
- If yes, funding approved? ☐ Yes ☐ No

Development Phase, Definition Stage

Overview

The Definition Stage is essential to developing the details for the project implementation (execution) plan and finalizing the project scope and other details. In some domains, this stage could be called the preliminary engineering stage, front-end engineering design (FEED), or other names. The stage work often leads to final approval and formal funding. In capital projects, this might be called the *Final Investment Decision* (FID).

Stage Deliverable: Project Detailed Plan (PDP)

Table 6: MLP Method, Project Detailed Plan (Definition Stage)

Topic	Instructions
Scope of Work & WBS	The team must provide a detailed description of the project scope of work, including a list of deliverables and descriptions. It would also be highly beneficial to update and expand the initial WBS to the necessary level of detail. The WBS is a core document that we should refer to when developing all the subsequent sections. We recommend drawing the WBS first (using any relevant tool). Next, you can provide the details for all the WBS Elements to develop a detailed scope of work and deliverables.
Quality, Health, Safety, Security, Environment Plans	Depending on the project, some of these factors might not be considered. The team needs to specify the applicable standards, laws, regulations, and internal policies that the project should comply with. Once the team defines the compliance requirements, they must plan what the team must do to ensure compliance. Notice that there is a sustainability section later. The difference is that the environment, in the context of this section, is about compliance with laws and regulations, whereas sustainability is a choice.
Project Schedule (Estimate 3)	With the detailed scope of work defined and the compliance items identified that the project manager and team can develop a detailed project schedule, which would expand on the earlier schedule. This schedule would become a control document for implementation, and the team will measure the final reconciliation against it.
Cost Estimate (Estimate 3)	The team can develop the cost estimate, as with the time estimate. Remember to consider internal and external costs. The cost estimate should be based on the work packages at this project stage.
Time-Phased Budget	Update the time-phased budget from the earlier stage.

Topic	Instructions
Staffing Plan	In the previous stage, the team defined the project management team and the other team members required for this stage. At this stage, the team needs to revisit this exercise and update the team requirements, focusing on the upcoming stages. For larger projects, the organization may outsource implementation. In that case, the service provider will develop full staffing for implementation, but the project owner (client) must still address its own (internal) staffing requirements. This section will include resources, numbers, names, positions, roles, expertise, availability, etc.
Stakeholders Engagements Plan	The project manager and the team may need to expand on the stakeholders' engagement plan from the project management plan. They will review the stakeholders' list, understand each stakeholder's role, how a given stakeholder affects or is affected by the project, and how to manage the relationship. It is critical to keep the stakeholders informed and involved where necessary.
Communication Plan	Update the communication plan from the earlier section and expand on it to cover all the necessary details. The team must develop the details for internal and external communication.
Risk Management Plan	During the development of the detailed project plan, a detailed risk assessment, including identification, analysis, and response planning, should be performed. This exercise might also affect the overall project risk and the contingency allowance.
Procurement Plan	If there are any outsourcing requirements, the team must define them and develop the proper plan to conduct procurement.
Sustainability Management Plan	Depending on the type of project, we may need to consider sustainability matters and develop or update the sustainability management plan. GPM Global also recommends conducting an impact assessment using their model.
Other Considerations	Are there any other items that might require a plan that would be specific to this project?
Comments	The Project Manager and Team can add anything they want to say to expedite the decision-making process.

Stage Gate: No 5, Final Approval

All stage gate templates are similar; please refer to Table 2. The only differences are:

- The purpose of the gate.
- The reviewers and decision-makers might change from one gate to another.
- For this gate, verify if final funding is required.

In this case, the stage gate review includes:

- Is there a need for final funding at this stage? ☐ Yes ☐ No
- If yes, funding approved? ☐ Yes ☐ No

Delivery Phase, Operational Readiness Stage

Overview

There are no specific processes to highlight here except the need to focus on getting ready for operations if there is an operation for the project's product. The following sections highlight the key components that the project team may need to document.

If applicable, all the topics listed below should have been identified during the project management planning and included in the *Project Management Plan* (or an independent operational readiness plan). During the operational readiness stage, the team would perform the 'work,' which could include writing procedures, performing tests, training, or commissioning a facility.

Stage Deliverable: Operational Readiness Summary (ORS)

Table 7: MLP & SSP Methods, Operational Readiness Summary (Operational Readiness Stage)

Topic	Instructions
Policies	If there are any policies for smooth and systematic operations, the team needs to list and document/develop them.
Operations Procedures	Operations procedures will likely be needed if the project involves delivering a product (facility, business process, etc.). These could include operating machines in an industrial facility or managing financial, human resources, or marketing matters.
Maintenance Procedures	Like operations, various projects could have items to maintain regularly, and this is the place to list and document these procedures.
Training Program	For most projects, whether producing something new or modifying an existing system, there is likely a need to train the "users" on how to do their jobs according to the new/modified system. This is true whether we are dealing with machines or business processes.

Topic	Instructions
Testing & Pre-Commissioning	Pre-commissioning might apply to facilities projects, whereas testing is more generic. Like training, any new or modified system will likely require testing before the product is put into operation, and we need to provide the proper documentation.
Inspections and Reviews	During the handover process, the project team and client personnel usually get together to inspect and review the work to determine whether everything is ready to hand over the product from the project team to the client/operations. The team will document all activities.
Initial/Provisional Acceptance	If all deliverables are completed per plan and specifications, the client will issue a completion certificate indicating an initial or provisional product acceptance. The term "initial" refers to the fact that this is not the final acceptance; *Final Acceptance* will be after commissioning and initial operations, if applicable.
Exceptions/Snag List	All deliverables might be complete. However, there could be some exception items. If the exception items are necessary for operations (critical items), Operations will not accept the handover until all critical issues have been satisfactorily completed. However, there might be some items, maybe cosmetic in nature, where the client can provisionally accept the product on condition that the team will resolve them before final acceptance. We call these "Snag List." This is the place to document all these items.
Comments	The Project Manager or the Operations Manager can add anything they want to say to expedite the decision-making process.

Stage Gate: No 6, Ready for Handover?

All stage gate templates are similar; please refer to Table 2. The only differences are:

- The purpose of the gate.
- The reviewers and decision-makers might change from one gate to another.
- This gate aims to verify if the teams have completed the implementation and operational readiness work to allow the product to transition from the implementation team to the operational team.

In preparation for the handover, the client and teams will typically meet to discuss the status, inspect the work, verify completion, and validate the output. The objective is for the client to consider accepting the handover of the project's product. Because of this review, the client can accept the work, reject it, request revisions, or require fixing any defects. If acceptable to hand over, a provisional acceptance certificate or letter would be needed.

Some remaining (incomplete) work may exist. If this pending work affects operations, the handover will be postponed. However, if this work is not critical for operations, the teams will proceed with the handover on the condition that the implementation team will complete these items before demobilization.

Delivery Phase, Implementation Stage

Overview

The Implementation Stage is the most straightforward stage of the project management process. It is primarily about designing and building the product, so most of the work is product development. Most of the project management work here is related to monitoring and controlling the project work.

Further, this stage is highly impacted by the development approach.

- If the project uses sequential development (one deliverable at the end), then this stage focuses on delivering the final product. In capital projects, splitting this stage into two stages (design/build or engineering/construction) or three (engineering, procurement, and construction) is standard.
- If the project follows an agile development approach (multiple iterations and increments), the implementation summary we share here could be repeated, with one summary per increment.

Stage Deliverable: Implementation Summary (IS)

Table 8: MLP & SSP Methods, Implementation Summary (Implementation Stage)

Topic	Instructions
General Statements	The main effort is to complete the deliverables (work packages) that the team outlined in the *Project Detailed Plan*. Project control and change management will be more focused and detailed during the implementation. As a result, the execution team will be performing work. In contrast, the project management team will oversee, manage, and monitor the performance against the plan, identify deviations and the need for corrective actions, undertake preventive actions, and manage change. All these concepts happen throughout the project but become more apparent (and quantitative) during implementation due to details from the PDP and baselines.

Topic	Instructions
Deviations and Corrective Actions	As the executing team performs work, they encounter differences (variances from the plan). The project manager and PMT will evaluate these deviations, determine the need for corrective actions, and take the necessary measures to correct them where possible. The variations could be related to any function, such as scope, quality, human resources, and time.
Preventive Actions	In a way, preventive actions can be hidden since they are what the project management team should do continuously; that is the art of proactive project management. The project management team must be diligent to prevent errors, deviations, or incidents.
Project Changes	Managing change is an ongoing effort, and the team must understand the organizational processes to do so. As we stressed earlier, the team should manage a change between the stages and not only during the implementation.
Objective Changes	Managing changes, whether contract, project, or objective, would follow a similar process. The only difference is the type of change and how to fund it. Typically: Project changes are changes to the project management plan or the project needed to ensure the team meets the project objectives. These are necessary to fulfill the project's needs and would be covered by the contingency allowance or reserves. On the other hand, objective changes are conscious decisions by management or the customer to change one or more of the project objectives. Typically, these changes might be about changing the capacity, size, or location of the facility being built. It could be adding features that are good or nice to have but not a must-have. Since these changes affect the objectives, they could justify a request for additional funding or an extension of time.
Complete Critical Items	Critical items are those identified during the Handover review. They must be completed before Operations issue the Provisional Acceptance.
Complete Snag List Items	These are the items identified during the Handover review but can be completed after Provisional Acceptance.
Comments	The Project Manager and Team can include anything they want to add to expedite the decision-making process, deliver the project successfully, and obtain the customer's acceptance.

Stage Gate: No 7, Implementation is Complete

All stage gate templates are similar; please refer to Table 2. The only differences are:

- The purpose of the gate.

- The reviewers and decision-makers might change from one gate to another.
- This gate aims to verify if the teams have completed all the implementation work and demobilize the implementation team.

After stage gate 6, there could still be work by the implementation team to clear all the snag list items. Once all that work is done, management will consider the implementation work completed at SG7 and release the implementation team. Other initial operations work could still be going on.

Delivery Phase, Initial Operations Stage

Overview

Some projects might require an initial operations period to demonstrate everything is working well. During this period, the work might be at reduced capacity. An alternative term for this will be a "soft launch." Further, for some complex projects, especially organizational change in large organizations, it might be best to launch the new product (or process) in one division, capture the learning, improve, and then fully release. This partial launch might be called a Pilot.

Stage Deliverable: Initial Operations Summary (IOS)

Table 9: MLP & SSP Methods, Initial Operations Summary (Initial Operations Stage)

Topic	Instructions
Commissioning Summary	If the project requires commissioning (startup), the team must document all activities with the required details.
Initial Operations Summary	The team will document the necessary information if there is a pilot or an initial operations period.
Review of Snag List Items	The team will review the list of exceptions and snag list items to verify the completion of this work and document the results. Typically, this should happen with Stage Gate 7, but the Operations team must confirm.
Final Inspection and Reviews	The project team and client personnel will meet for the final inspections and reviews of the work to determine whether everything works correctly for the *Final Acceptance*.
Final Acceptance	Document and issue the final acceptance certificates.

Stage Gate: No 8, Final Acceptance

All stage gate templates are similar; please refer to Table 2. The only differences are:

- The purpose of the gate.
- The reviewers and decision-makers might change from one gate to another.
- This gate aims to verify if the teams have accepted the product and are ready to issue a final acceptance certificate.

At this time, management should be able to accept the final product or require further work before they can grant the final acceptance.

Delivery Phase, PLC Closure Stage

Overview

From a project management perspective, the end of the project is at the end of its **life cycle**, which is the closing stage. However, in the Uruk Framework, we changed the name to the "PLC Closure Stage" to be explicit that this stage only closes the project life cycle. The actual project closure will happen after the final success assessments.[7]

Closing the project life cycle is necessary since keeping the project manager or team members on the project beyond that point would not make sense. However, from an organizational/project owner perspective and per ***the Uruk Framework***, the project ends later.

The project's end (closure) is when the organization, possibly through the Project Management Unit (PMU)[8], performs the final success assessment, which could be months or years after closing the project life cycle. Consequently, when the project team completes a project (at the end of the project life cycle, i.e., PLC Closure), they transfer the project information to the PMU for future success and financial evaluations.

[7] Refer to the Four Dimensions of Project Success videos: short: https://youtu.be/qqnXM_zz9tM; long: https://youtu.be/z2Vr6Qz1sBw.

[8] The project management unit is the concept that Uruk is promoting in support of transforming project management. We document our case for change and the envisioned future in the book, ***Vision Realized!*** Second Edition published in 2026.

Special Condition

While working on a project, management could stop/terminate the project for one reason or another. This could happen at any stage gate in the Uruk Way and the Uruk Platform. When management rejects the work or decides to stop a project, the Uruk Platform will lock all the subsequent stages and open the PLC Closure stage so the project team can formally close the project and complete a *Project Termination Report*, which we cover in Part G. In this case, we designate the project as closed, not completed.

Stage Deliverable: Project Completion Report (PCR)

Table 10: All Methods, Project Completion Report (PLC Closure Stage)

Topic	Instructions
Performance Reconciliation	Highlight the main variations between the plan and actual performance, such as deviations, changes, etc.
Captured Lessons Learned Summary	Summarize the lessons learned from the stages and add any other lessons the team could identify.
Project Success (First two Dimensions)	Evaluate the project's success per the four dimensions. We can assess two dimensions at the project's PLC closure. Whatever we cannot measure yet, we will identify potential timing for when the organization can determine.
Future Follow Up	Any future follow-up that might be required in terms of what and when. For example, if we cannot measure product delivery success yet, when do we think we can? Is the same for the project's objectives success? The team should think out of the box and consider anything that could be necessary or nice to pursue in the future – related to this project.
Prepare Files for Archiving	Depending on the organizational policies, the team might need to send the information to the PMU. However, Uruk is a digital solution; the information is already stored.
Comments	The project manager and team can add anything they want to document for the final closure.

Stage Gate: No 9, Project is Complete

All stage gate templates are similar; please refer to Table 2. The only differences are:

- The purpose of the gate.
- The reviewers and decision-makers might change from one gate to another.
- **At this stage gate, you can only Approve or Revise. Hold or Terminate are no longer applicable.**

- This gate aims to verify if the teams have accepted the product and if the project completion report is ready; accept it, and declare the project complete.

Part B. Small – Simple Projects (SSP)

Introduction

The Small-Simple Projects Life Cycle is suitable for projects with low or reasonable complexity. The classification often depends heavily on the industry or domain. For example, within capital projects, this method might be suitable for building a house or a small facility. Whereas in a marketing or training project, this can be for larger projects. There is no fixed, mathematical way to determine the project class. Therefore, we recommend that you decide based on what you can understand, and as you gain experience, you will have a better chance of selecting the right project class.

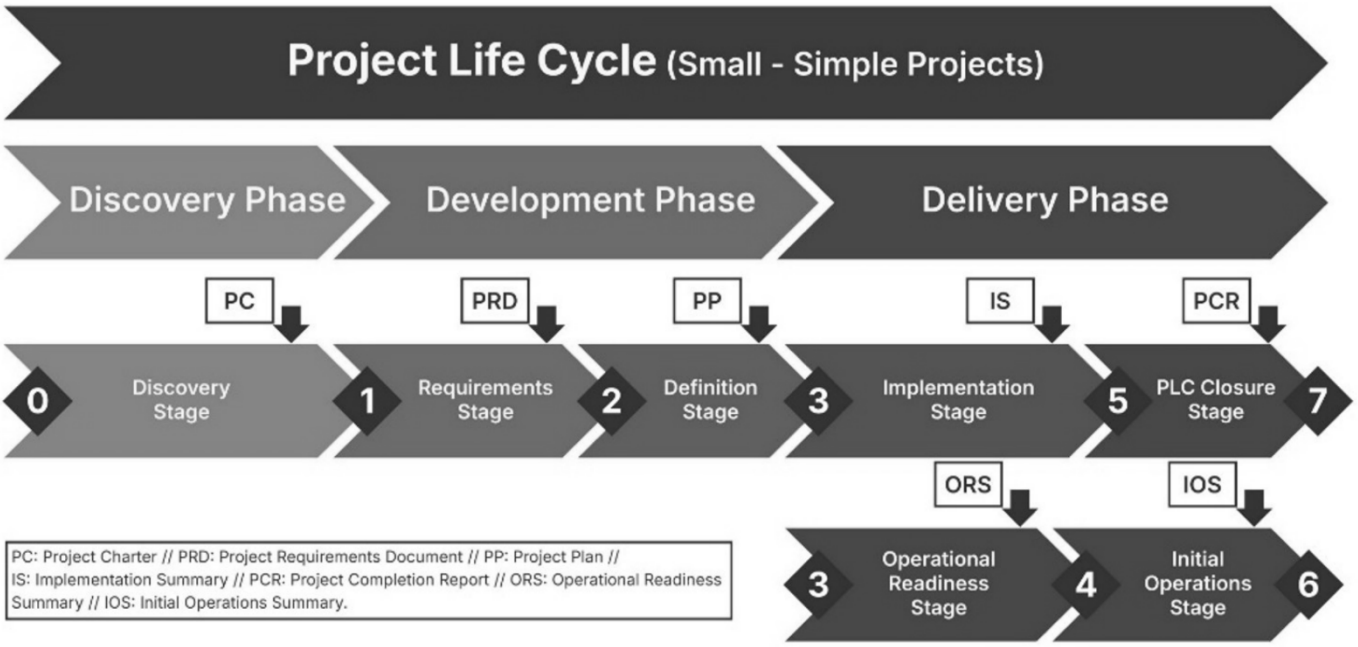

Figure 2: VDM – Small-Simple Projects

Discovery Phase, Discovery Stage

We combined the concept and feasibility stages into a "Discovery Stage" with the *Project Charter* as the output for micro and small-simple projects.

Table 11: Micro & SSP Methods, Project Charter (Discovery Stage)

Topic	Instructions
Problem/Opportunity (what)	Describe the problem to solve or the opportunity to pursue.
Product Description (output)	Explain the final project output. These questions could help with this task. • What will the project produce? • What do you want to accomplish with this project? • What will the project give the organization when done? The output means the project's product, physical or otherwise, such as a house, software, or service.
Justifications/Expected Benefits (outcome)	The project justification is another name for the business case. It should cover: • Why are we doing the project? • What are the drivers and reasons for the project? • What threat are we trying to manage or the opportunity we want to exploit? For business projects, the primary drivers are profit, revenue growth, cost reduction, and market penetration. However, for NGOs, the driver might be social or community needs in government or not-for-profit projects. The description concerns the project's "output," whereas the justification concerns the "outcome," the expected benefits.
Does the project align with the organization's strategic plan?	This should be: □ Yes, □ No, □ Not Sure
How does it align? (purpose)	The methodology view is that all projects must be aligned with a specific strategic goal or initiative, either through a program or independently of one. Therefore, in this section, we examine how this project aligns with the organization's strategic direction and objectives. If it does not align, explain why.
Team Considerations	Human resources (team) considerations at this stage are mostly about availability, capability, expertise, and whether the organization can perform the project work with internal or external resources. At this stage, the focus is on the initial stages since the team will update the staffing requirements for the later stages once there is project management and detailed plans. Finally, this topic is not about naming people or assigning resources to the project!
Sustainability Considerations	Depending on the type of project, we may need to consider sustainability matters. Sustainability is about the impact on society, the economy, or the environment.
Market or Social/Community Evaluations	Market evaluations are peculiar to the market demand and supply. Whereas Social/Community Evaluations are related to non-commercial projects.

Topic	Instructions
Legal/Regulatory Considerations	Are there any legal or regulatory matters that might impact the project, and must we comply with them? Examples include licensing, permits, registrations, etc.
Financial Considerations	Financial considerations are specific to funding or financing the project and are not about the project's cost; project cost is independent, as mentioned earlier. Financial considerations would be required if the project is not part of the standard operating budget and needs specific funding, whether from the organization's capital or operating budget or outside financing.
Time & Cost Considerations (Estimate 1)	Time considerations include the expected project duration, project milestones, key dates, or any other time-related topic to address. Is there a time window within which the project may not be feasible? On some projects, this would be the output of an initial estimate, which we call Estimate 1. The same goes for the cost considerations.
Significant Project Risks	Are there any significant risks that surface early in the project? It is worth noting that the feasibility study itself is a form of overall project risk assessment, as the team conducts it to decide whether to pursue an opportunity. The team performs risk assessments for large projects while planning each stage. For small, simple projects, the team conducts a detailed risk assessment with a detailed plan for the project.
How to determine success	If the success criteria were not included in the Project Brief, this is the time to revisit and include them.
Comments	The final comments by the project manager and team, if necessary.

For the stage gate, it would be the same as the other methods and stages.

Development Phase, Requirements Stage

This would be the same as the Requirements Stage in the Medium-Large Projects.

Development Phase, Definition Stage

The Definition Stage here combines the Strategy and Definition Stages from the Medium to Large Projects. In this case, the stage deliverable is the Project Plan.

Table 12: SSP Method, Project Plan (Definition Stage)

Topic	Instructions
Project Management Team	The project management team (PMT) consists of the project manager and other members whose job is to support the project manager in managing the project. These could include cost and schedule specialists, project engineers, planners, and other resources. At this time, the PMP will consist of all these resources, functions, numbers, project timing, and reporting relationships. Therefore, the plan must include what is required for each stage regarding numbers, positions, and experience level.
Extended Project Team	The project technical team comprises the 'functional/technical' members who will perform the project work. This section expands on the previous section's project organization chart, staffing plan, and RACI chart. For smaller projects, we could also merge this and the last section into one section. At this stage, the focus is on identifying the technical/functional team members needed to work on the PDP. During the PDP development, the PMT will update the project team with a focus on the implementation team.
Scope of Work & WBS	The team must provide a detailed description of the project scope of work, including a list of deliverables and descriptions. It would also be highly beneficial to update and expand the initial WBS to the necessary level of detail. The WBS is a core document that we should refer to when developing all the subsequent sections. We recommend drawing the WBS first (using any relevant tool). Next, you can provide the details for all the WBS Elements to develop a detailed scope of work and deliverables.
Quality, Health, Safety, Security, Environment Plans	Depending on the project, some of these factors might not be considered. The team needs to specify the applicable standards, laws, regulations, and internal policies that the project should comply with. Once the team defines the compliance requirements, they must plan what the team must do to ensure compliance. Notice that there is a sustainability section later. The difference is that the environment, in the context of this section, is about compliance with laws and regulations, whereas sustainability is a choice.
Stakeholders Engagements Plan	The project manager and the team may need to expand on the stakeholders' engagement plan from the project management plan. They will review the stakeholders' list, understand each stakeholder's role, how a given stakeholder affects or is affected by the project, and how to manage the relationship. It is critical to keep the stakeholders informed and involved where necessary.
Communication Plan	Update the communication plan from the earlier section and expand on it to cover all the necessary details. The team must develop the details for internal and external communication.
Procurement Plan	If there are any outsourcing requirements, the team must define them and develop the proper plan to conduct procurement.

Topic	Instructions
Physical Resources Plan	This is necessary to identify any needs for physical resources.
Risk Management Plan	During the development of the detailed project plan, a detailed risk assessment, including identification, analysis, and response planning, should be performed. This exercise might also affect the overall project risk and the contingency allowance.
Sustainability Management Plan	Depending on the type of project, we may need to consider sustainability matters and develop or update the sustainability management plan. GPM Global also recommends conducting an impact assessment using their model.
Acceptance Criteria	Completion is different from acceptance and different from success. What are the minimal requirements for management or the client to accept the project's product? Is it possible to reject the product of the project and under what conditions? What would be the legal ramifications if the client's organization did not accept the product of the project?[9]
Success Criteria & Factors	Review and refine the success criteria if necessary. Identify the factors that can contribute to achieving success.
Project Schedule (Estimate 2)	With the detailed scope of work defined and the compliance items identified that the project manager and team can develop a detailed project schedule, which would expand on the earlier schedule. This schedule would become a control document for implementation, and the team will measure the final reconciliation against it.
Project Cost (Estimate 2)	The team can develop the cost estimate, as with the time estimate. Remember to consider internal and external costs. The cost estimate should be based on the work packages at this project stage.
Time-Phased Budget	Once the project cost and time estimates and the high-level PBS and WBS are complete, the team can develop the initial time-phased budget reflecting the project budget over time. This information is also helpful for: • Calculating inflation cost if the project lasts for an extended period—say, over six months or a year. • Developing cash-flow curves and expectations. • Calculating investment costs (loans or bonds) if required. The time-phased budget included with Estimate 2 is still considered preliminary. The final TPB will be part of the Project Detailed Plan.
Performance Management Baseline (PMB)	The team can generate the *Performance Management Baseline* (PMB), which is the planned value curve, per the earned value management terminology. The PMB included with Estimate 2 is still considered preliminary. The final PMB will be part of the Project Detailed Plan.

[9] This last point is applicable if the work is done under a contract.

Topic	Instructions
Comments	The Project Manager and Team can add anything they want to say to expedite the decision-making process.

Delivery Phase, Operational Readiness Stage

This would be the same as the Medium-Large Projects.

Delivery Phase, Implementation Stage

This would be the same as the Medium-Large Projects.

Delivery Phase, Initial Operations Stage

This would be the same as the Medium-Large Projects.

Delivery Phase, PLC Closure Stage

This would be the same as the Medium-Large Projects.

Part C. Micro Projects

Introduction

This method is applicable for projects that could last a few days or weeks, cost is low, and the resource requirements are also low.

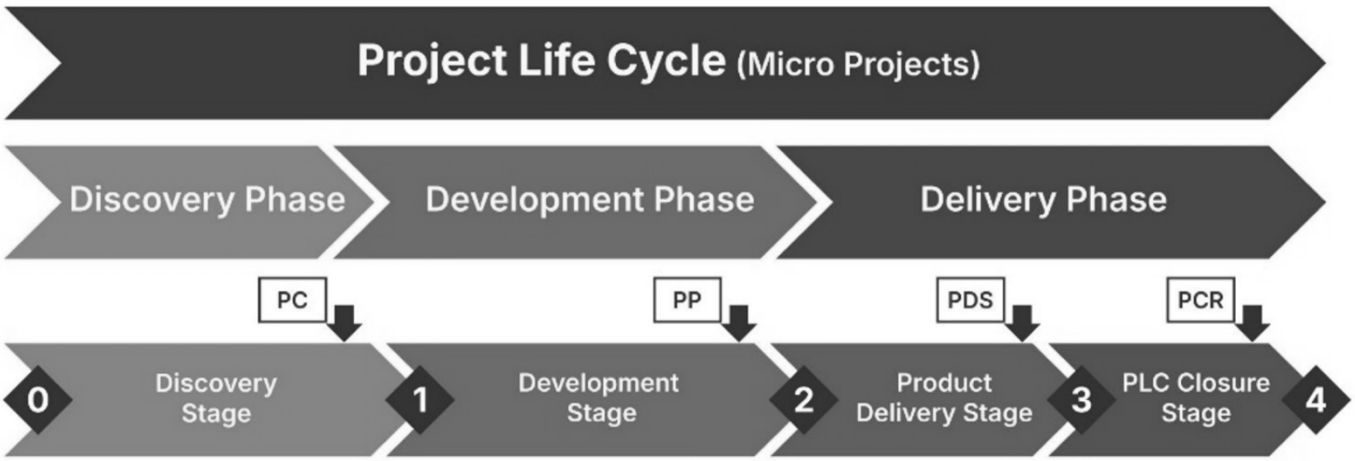

Figure 3: VDM – Micro Projects

Discovery Phase, Discovery Stage

This would be the same as the Discovery Stage in the Small-Simple Projects.

Discovery Phase, Development Stage

This would be the same Project Plan used in Small-Simple Projects.

Delivery Phase, Product Delivery Stage

For micro-projects, we combine the implementation and operational stages. Therefore, we have only one

output: the Product Delivery Summary.

Table 13: Micro Method, Product Delivery Summary (Product Delivery Stage)

Topic	Instructions
General Statements	The main effort is to complete the deliverables (work packages) that the team outlined in the *Project Plan*.
Deviations and Corrective Actions	The project manager and team will evaluate these deviations, determine the need for corrective actions, and take the necessary measures to correct them where possible.
Preventive Actions	In a way, preventive actions can be hidden since they are what the project management team should do continuously; that is the art of proactive project management. The project management team must be diligent to prevent errors, deviations, or incidents.
Project Changes	Managing change is an ongoing effort, and the team must understand the organizational processes to do so. As we stressed earlier, the team should manage change between the stages and not only during the implementation.
Are there exceptions?	Identify any items that do not comply with the plan and list them.
Complete exception Items	Complete all exception items.
Comments	The Project Manager and Team can include anything they want to add to expedite the decision-making process, deliver the project successfully, and obtain the customer's acceptance.

Delivery Phase, PLC Closure Stage

This would be the same as the Medium-Large Projects.

Part D. Programs

Introduction

We treat a program as a special, tailored method. Therefore, the phase-level life cycle is shown in Figure 5. Figure 6 expands the program life cycle and shows the stages. What these figures do not show are the stage deliverables and stage gates, but they are similar to the project methods, with some changes, as we will highlight in this section.

The most significant difference is the Delivery Phase. At the program level, delivery is happening at the projects' level. Therefore, Implementation, Operational Readiness, and Initial Operations stages are linked to the projects' level, and all together represent the program delivery.

Another significant change is that the program method has four phases, instead of three.

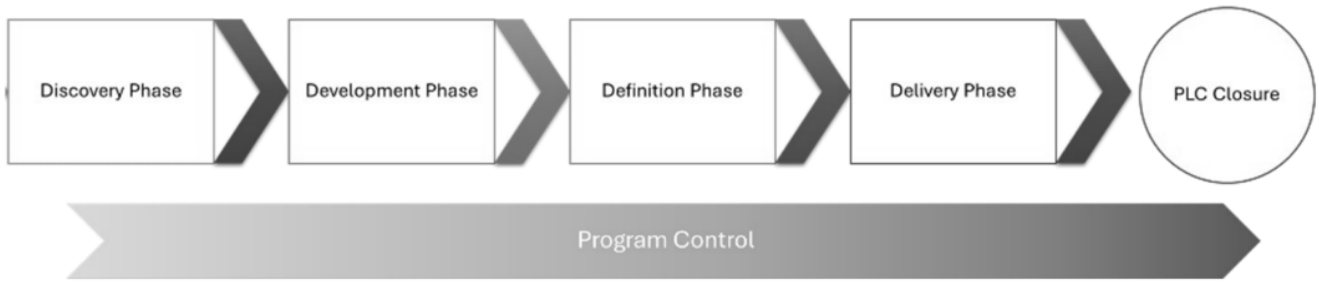

Figure 4: VDM – Program Life Cycle – Phase Level

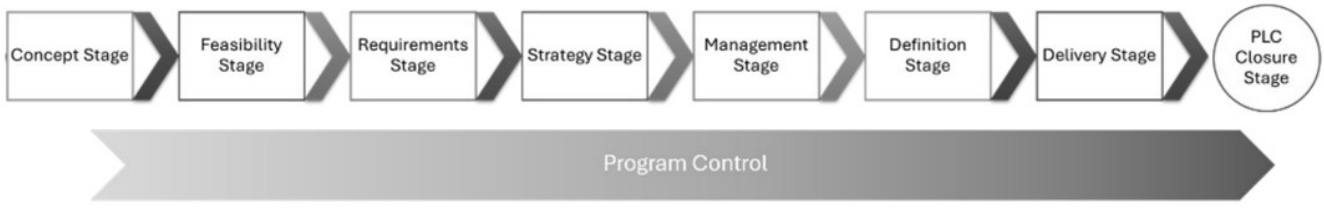

Figure 5: VDM – Program Life Cycle – Stage-Level

Discovery Phase, Concept Stage

Overview

The Concept Stage is necessary to develop the business case, establish the product vision, and define the desired program outcome and benefits. The primary output of this stage is the *Program Brief*. The purpose of the stage gate is to authorize the next stage. It is also necessary to ensure strategic alignment.

Stage Deliverable: Program Brief (PB)

Table 14: Program Method, Program Brief (Concept Stage)

Topic	Instructions
Background Information	If necessary, provide the necessary information to support the program review.
Problem, Opportunity (what)	Describe the problem to solve or the opportunity to pursue.
Solution (how)	Explain the solution envisioned, especially when it differs from the product description. In essence, describe how the program will achieve the desired results.
Product Description (output)	Explain the final program output. These questions could help with this task. • What will the program produce? • What do you want to accomplish with this program? • What will the program give the organization when done? The output means the program's product, physical or otherwise.
Justifications/Expected Benefits (outcome)	The program justification is another name for the business case. It should cover: • Why are we doing the program? • What are the drivers and reasons for the program? • What threat are we trying to manage or the opportunity we want to exploit? For business projects, the primary drivers are profit, revenue growth, cost reduction, and market penetration. However, for NGOs, the driver might be social or community needs in government or not-for-profit projects. The description concerns the project's "output," whereas the justification concerns the "outcome," the expected benefits.
Does the program align with the organizational strategy?	This should be: □ Yes, □ No, □ Not Sure

Topic	Instructions
Strategic Alignment	The methodology view is that all projects and programs must be aligned with a specific strategic goal or initiative. Therefore, in this section, we examine how this program aligns with the organization's strategic direction and objectives. If it does not align, explain why.
How to determine success? (measurable)	The Uruk Four Dimensions of Project Success. You can establish the criteria for all four dimensions. You can modify the criteria during the upcoming stages. However, you should lock them with final program approval before the delivery phase. The challenge here is to focus on the program-level success and note that every project will have its success criteria supporting the overall program.
Comments	The final comments by the program manager and team, if necessary.

Stage Gate: No 1, Strategic Alignment

Table 15: Stage Gate 1 (Concept Stage)

Topic	Instructions
Decision Criteria	In some organizations, they might have pre-defined criteria. In this case, the sponsor can comply with the criteria or justify an alternative. If there are no criteria, the sponsor and reviewers can add them here.
Attendees	If there are reviewers other than the sponsor, it would be helpful to list them along with their roles and contact information.
Decision Explanation	The program sponsor (and other reviewers) can briefly explain their decision if necessary.
Decision ☐ Approve ☐ Revise ☐ Hold ☐ Terminate	 Approve the stage deliverable and authorize the team to proceed. Request revisions to the stage deliverable and resubmit. Put the program on hold until management decides to reactivate. Terminate the program and proceed to close out.
Brief Record of Meeting	If there are reviewers, it might be helpful to keep a record of the essential points of this meeting.
Instructions to PM & Team	If the sponsor is to issue instructions to the program manager for the next stage.
Date	Date of the decision, resolution of the stage gate.

Discovery Phase, Feasibility Stage

Overview

This stage could have two stage deliverables and one stage gate. The stage work leads to the *Feasibility Study Report* (FSR), and after stage gate 2, the sponsor could issue a *Program Authorization Document* (PAD). We cover the PAD in Part G.

Remember that the feasibility study is not a detailed plan or a management plan; it is also not a business case. It primarily assesses whether the organization can deliver the product and complete the program successfully. Therefore, we do not need intensive details for the content. Complete these considerations and evaluations with a mindset: ***What could hurt or help the project?*** In other words, this is a form of a high-level risk assessment.

Stage Deliverable: Feasibility Study Report (FSR)

Table 16: Program Method, Feasibility Study Report (Feasibility Stage)

Topic	Instructions
Internal Cross Evaluations	This item is specific to identifying internal synergies or overlaps and avoiding duplication of effort, especially in large organizations. For example: • Is there another organizational unit working on a similar project? • What might other projects influence this program negatively or positively? • What other projects or programs could be affected by this program?
Team Considerations	Human resources (team) considerations in the feasibility study are mostly about availability, capability, expertise, and whether the organization can perform the program work with internal or external resources. At this stage, the focus is on the initial stages since the team will update the staffing requirements for the later stages once there is program management and detailed plans. Finally, this topic is not about naming people or assigning resources to the program!

Topic	Instructions
Market Evaluations	Market evaluations are peculiar to the market demand and supply. • Regarding demand, did the team perform an unbiased market assessment to determine the need for the products the program will deliver? • Next, include an evaluation of the competition. These evaluations apply if the program involves releasing a new product to market or enhancing an existing one. A product could be a gadget or a service. A course, a computer application, and a consultancy solution are all products. Market evaluation is usually one of the most challenging items to assess, especially in locations with no reliable resources and statistics on market size and other factors affecting the market.
Social/Community Evaluations	These evaluations would be like market evaluations, but in this case, they are specific to social and community needs and requirements. They would apply to government, NGOs, and not-for-profit programs, and they may also apply to Corporate Social Responsibility (CSR) programs.
Location Factor Considerations	What are the location considerations for the program, if applicable? For example, the program's location could affect its cost, quality, and other factors. This might include the territory where the organization would be providing the service or selling the new product is also vital.
Technology Evaluations	Technology evaluation concerns any technology-related matters relevant to the program. These items are not part of the day-to-day environment. For example, there is no need to mention that we need MS Project or Google Docs. Instead, this would be for things like this building requiring total automation or software development based on the latest technology. The main idea is the potential risk if the program requires new or unproven technology.
Legal/Regulatory Considerations	Are there any legal or regulatory matters that might impact the program, and must we comply with them? Examples include licensing, permits, registrations, etc.
Sustainability Considerations	Depending on the type of program, we may need to consider sustainability matters. Sustainability is about the impact on society, the economy, or the environment.
Time Considerations (Estimate 1)	Time considerations include the expected program duration, program milestones, key dates, or any other time-related topic to address. Is there a time window within which the program may not be feasible? On some programs, this would be the output of an initial estimate, which we call Estimate 1.

Topic	Instructions
Cost Considerations (Estimate 1)	This section deals with the estimated total cost of the program. The program cost includes external and internal costs or internal resource hours. It is a frequent practice that many organizations do not account for their internal cost or effort, which is an organizational choice. However, we believe capturing internal costs and effort is necessary since these are actual costs to the program. If the program involves launching a new business or service, operating costs may also need to be considered at this time. This could be the output of an initial estimate, which we call Estimate 1.
Other Considerations	If there are any other items specific to the program that we did not include, this is the place to list and consider them.
Significant Program Risks	Are there any significant risks that surface early in the program? It is worth noting that the feasibility study itself is a form of overall program risk assessment since the team is conducting it to decide whether to pursue an opportunity. The team performs risk assessments for programs while planning each stage. For small-simple programs, the team conducts a detailed risk assessment with a detailed plan for the programs.
Financial Considerations	Financial considerations are specific to funding or financing the program and are not about the program's cost; program cost is independent. Financial considerations would be required if the program is not part of the standard operating budget and needs specific funding, whether from the organization's capital or operating budget or outside financing.
Conclusion and Recommendation	This part concerns the program manager and team's conclusion on the feasibility and recommendations. If the program is only feasible within a window of opportunity or under specific conditions, this is the place to state these conditions.
How to determine success	If the success criteria were not included in the Program Brief, this is the time to revisit and include them.
Comments	The final comments by the program manager and team, if necessary.

Stage Gate: No 2, Initial Authorization

All stage gate templates are similar. Here, we will only highlight any differences from what we listed with the first stage gate.

Development Phase, Requirements Stage

Overview

The Requirements Stage involves a vision of the final product. In this stage, the team collects the stakeholders' input and expectations, business requirements, and any other relevant information that would help the team proceed with the program work. The team would also develop the work breakdown structure.

Stage Deliverable: Program Requirements Document (PRD)

Table 17: Program Method, Program Requirements Document (Requirements Stage)

Topic	Instructions
Description of the Product	This section describes the program's product, including any additional information the team developed or gathered during the Discovery Phase. It elaborates on the information listed earlier, and the team should expand on the description. However, the team must be careful not to go into too much detail since the details will be part of the detailed program planning effort.
Characteristics of the Product	Explain the characteristics of the product and the required features, where applicable.
Explore the Expectations	Collaborate with the client (internal or external) (or stakeholders) to explore the customer's expectations and to transform those implicit expectations into explicit and clear requirements. Requirements are specific items we can list and itemize, whereas expectations are mostly 'state-of-mind' and not easy to document. To enhance the chance of success, a program manager cannot just depend on listed requirements but must explore the expectations. Please note that this is NOT about the expectations of the program manager. It is about the expectations of the various stakeholders, especially management.
Stakeholders' Input	It is implicit that to identify the program requirements and explore the expectations, one will need to seek the input of the different stakeholders, but we are adding this here to emphasize the need to do so and not to limit the discussions to management or the key stakeholders. We need to gather input from all relevant stakeholders, directly or indirectly. It is often the case that while collecting input, the program team will explore the expectations listed earlier.

Topic	Instructions
Alternatives Evaluations	Considering and listing any alternatives here is necessary to select the best options. We could also list some other options here for review in later stages. The alternatives could be to the project, scope, schedule, location, procurement, etc. However, we recommend not leaving any significant alternatives open beyond this stage since they could lead to disruptive changes later.
Project Boundaries	Boundaries are particularly valuable to draw and are crucial for clarifying the program and its components. In other words, what is included in the project, and what is not included?
Product Breakdown Structure (PBS)	PBS is a visual representation of the final product. It is a tool to help the team and stakeholders understand and align the product scope as the starting point for defining the program scope. Therefore, it is an input to the WBS.
Work Breakdown Structure (WBS)	The team will use a work breakdown structure (WBS) to show the work deliverables required to complete the program's output at this stage. For the project, the WBS would be high-level and have no details. However, for this stage (part of rolling wave planning), we can have information on the work and work packages.
Constraints	At this stage, the team needs to revisit the defined restrictions and determine whether some constraints have been relaxed, removed, or new ones added.
Assumptions	The team needs to revisit the assumptions, as well as the constraints, to see if they are still valid and whether new assumptions are needed.
Best Practices	This stage is an ideal time during the development phase to introduce industry-specific best practices, if there are any. It is necessary to do so at this point in program life since the best practices will propose possible alternatives. In various industries, there could be many best practices to consider.
Sustainability Requirements	Depending on the type of program, we may need to consider sustainability matters.
Acceptance Criteria	Completion is different from acceptance and different from success. What are the minimal requirements for management or the client to accept the project's product? Is it possible to reject the product of the program and under what conditions? What would be the legal ramifications if the client's organization did not accept the product of the program?
Success Factors	Review and refine the success criteria if necessary. Identify the factor that can contribute to achieving success.
Comments	The Project Manager and Team can add anything they want to say to expedite the decision-making process.

Stage Gate: No 3, Stakeholders Alignment

All stage gate templates are similar. Here, we will only highlight any differences from what we listed with the first stage gate.

Development Phase, Strategy Stage

Overview

This is one of the main differences between projects and programs. In the project method, the strategies were part of the Program Management Plan, as in the first section. Here, we separated them since, for programs, the strategies can be critical and must be approved before developing the Program Management Plan.

Stage Deliverable: Program Strategy Document (PSD)

Table 18: Program Method, Program Strategy Document (Strategy Stage)

Topic	Instructions
Program Management	The program management strategy is about the general organizational approach to managing the program. It is a set of statements that establish the general program management guidelines. The word strategy represents high-level thinking or approach, not a detailed plan.
Delivery	The delivery strategy may not apply to some programs because they may not require any special circumstances. The strategy is mostly related to the implementation of the work and the focus on high-level thinking on how to do the job—in other words, how to manage the delivery phase of the program and go from this point to completion. In program management, this might be the time when the team can start to define the work split into projects or other work.
Product Development	Typically, this would be left to the project's level. However, if there is something applicable at the program level, it is important to identify the work here.
Procurement	Like the program management strategy, the procurement strategy is a set of guidelines for procuring goods and services to meet the program requirements. In some cases, procurement could cascade down to the project level.
Industry Leading Practices	Like procurement, this could also apply at the project level. However, include any program-level specific actions here.

Topic	Instructions
Sustainability	The team shall consider the sustainability strategy at this stage. GPM Global includes various aspects that can be incorporated here.
Comments	The Program Manager/Team can add anything they want to say to expedite the decision-making process.

Stage Gate: No 4, Strategy Approval

All stage gate templates are similar. Here, we will only highlight any differences from what we listed with the first stage gate.

Definition Phase, Management Stage

Overview

As mentioned earlier, we separated the strategy from the project management planning effort. Here, the focus is on the Program Management Plan. Keep in mind that management is happening at multiple levels. For programs, we have to manage and control at the program level, then at each project level, and even each project stage. Here, the focus is on the program level.

Stage Deliverable: Program Management Plan (PMP)

Table 19: Program Method, Program Management Plan (Management Stage)

Topic	Instructions
Section 1: "How to" Section	
How to Define the Program?	The definition stage (the next stage) focuses on detailed program planning and leads to the *Program Detailed Plan* (PDP). Notice the use of the term "how to define" and not define. What is the significance of these words? When asked "how to define," one is only answering the how-to! The answer might be, for example, "will need to survey our customers" or "will hire a landscape architect to design the garden." On the other hand, when asked to "define," this would be the survey's and garden's actual design, respectively.

Topic	Instructions
How to Manage the Program?	The previous point depends heavily on the program type and domain; therefore, it must include quite a bit of detail, whereas this section could be concise if the organization has a proper program management organizational system. In that case, this section could be limited to "follow the organizational processes and methods." However, without an organizational system, the program manager must explain the approach to managing the program to gain the sponsor's and management's acceptance.
How to Control the Program?	Some might prefer to merge 'manage' and 'control,' which would be acceptable. However, if we separate, these are some of the relevant questions: • How to monitor program performance? • How to ensure proper program control? • What is program control? Project control encompasses cost control, scope control, and time (schedule) control, among other program management functions. A better term to use is performance management; this would directly indicate program performance, which we check, or measure compared to the plan. Remember, control happens from the beginning; the idea and program are brief and remain active until the end. However, control in the earlier stages is mostly qualitative, but as the program moves into the delivery phase, control will be extensive and quantitative, hence the need to focus on "how to control" now.
How to Manage Change on the Program?	The second essential control component is the program's change management, which is specific to any proposed or approved changes from the plan. Change management is like control—it should extend from the start of the program but become more focused in the upcoming stages.
How to Get Ready for Operations?	It would be best to oversee this at the project level. However, there are topics that might be better managed at the program level, and you need to address them here.
How to Close the Project?	As the program moves into the implementation stage and progresses toward completion, a significant amount of work needs to start happening to deliver the program to the client (internal or external), and the team must also begin planning for program completion and closure. Some organizations do not put effort into program completion and closure; they view it as one of the least essential program activities. There is no glory after the work is complete. However, from a strategic perspective, the work is incomplete until the team formally publishes a *Program Completion Report* or a *Program Closeout Report*.
Section 2: The People Aspects	

Topic	Instructions
Program Management Team	The program management team (PMT) consists of the program manager and other members whose job is to support the program manager in managing the project. These could include cost and schedule specialists, program engineers, planners, and other resources. At this time, the PMP will consist of all these resources, functions, numbers, program timing, and reporting relationships. Therefore, the plan must include what is required for each stage regarding numbers, positions, and experience level.
Extended Program Team	It would be best to oversee this at the project level. However, there are topics that might be better managed at the program level, and you need to address them here.
Program Stakeholders	The program manager and team need to review the list of stakeholders, understand each's role, how they affect the program or are affected by the program, and how to manage the relationship. It is critical to keep the stakeholders informed and involved where necessary.
Program Communication Plan	Organizations need people to manage programs; programs impact people, and everyone affected needs to receive or pass information. The PMP is the tool the program manager will use to help establish the proper mechanism for effective communication. Planning starts with identifying the communication requirements for the program's various stakeholders, then providing the necessary answers regarding who communicates with whom, what information to share, how often, what format, and other relevant questions. The program team must carefully address the needs of non-team members and all other stakeholders.
Section 3: Estimate 2	
Project Schedule (Estimate 2)	At this time, the program management team will have a better understanding of the program. Therefore, they should develop a schedule or update the initial one from the feasibility study. This schedule might lead to changes in the program completion date. It would be beneficial to use a tool. It is worth noting that this schedule is not the final one; the final schedule will be part of the Estimate 3, which the team will develop in the Definition Stage.
Project Cost (Estimate 2)	The same goes for the program cost. With the program requirements and program management planning effort in place, the team will be able to update the program cost estimate.
Time-Phased Budget (TPB)	Once the program cost and time estimates and the high-level PBS and WBS are complete, the team can develop the initial time-phased budget reflecting the program budget over time. This information is also helpful for: • Calculating inflation cost if the program lasts for an extended period—say, over six months or a year. • Developing cash-flow curves and expectations. • Calculating investment costs (loans or bonds) if required. The time-phased budget included with Estimate 2 remains preliminary. The final TPB will be part of the Program Detailed Plan.

Topic	Instructions
Performance Management Baseline (PMB)	The team can generate the *Performance Management Baseline* (PMB), which is the planned value curve in earned value management terminology. The PMB included with Estimate 2 is still considered preliminary. The final PMB will be part of the Program Detailed Plan. However, at the program level, the PMB might be closer to being conceptual.
Comments	The Program Manager/Team can add anything they want to say to expedite the decision-making process.

Stage Gate: No 5, Program Management Plan Approval

All stage gate templates are similar. Here, we will only highlight any differences from what we listed with the first stage gate.

Advanced funding might be required if the definition stage requires more funds than can be allocated from the operating budget or if the stage work will be outsourced. Therefore, the stage gate template will include the following additional content.

- Is there a need for advance funding at this stage? ☐ Yes ☐ No
- If yes, funding approved? ☐ Yes ☐ No

Definition Phase, Definition Stage

Overview

The Definition Stage is essential to developing the details for the program implementation (execution) plan and finalizing the program scope and other details. At the program level, one of the key activities is to subdivide the program work into projects and other related tasks.

Stage Deliverable: Program Detailed Plan (PDP)

Table 20: Program Method, Program Detailed Plan (Definition Stage)

Topic	Instructions
Scope of Work	The team must describe the program scope of work, including a list of the potential projects and their descriptions.

Topic	Instructions
Quality & HSSE Plans	It would be best to oversee these at the project level. However, there are topics that might be better managed at the program level, and you need to address them here.
Project Schedule (Estimate 3)	With the detailed scope of work defined and the compliance items identified that the program manager and team can develop/update the program schedule, which would expand on the earlier schedule. This schedule would become a control document for implementation, and the team will measure the final reconciliation against it.
Cost Estimate (Estimate 3)	The team can develop the cost estimate, as with the time estimate. Remember to consider internal and external costs. The cost estimate should be based on the work packages at this program stage.
Time-Phased Budget	Update the time-phased budget from the earlier stage.
Staffing Plan	It would be best to oversee these at the project level. However, there are topics that might be better managed at the program level, and you need to address them here.
Stakeholders Engagements Plan	It would be best to oversee these at the project level. However, there are topics that might be better managed at the program level, and you need to address them here.
Communication Plan	Update the communication plan from the earlier section and expand on it to cover all the necessary details. The team must develop the details for internal and external communication.
Risk Management Plan	It would be best to oversee these at the project level. However, there are topics that might be better managed at the program level, and you need to address them here.
Procurement Plan	It would be best to oversee these at the project level. However, there are topics that might be better managed at the program level, and you need to address them here.
Sustainability Management Plan	It would be best to oversee these at the project level. However, there are topics that might be better managed at the program level, and you need to address them here.
Other Considerations	Are there any other items that might require a plan that would be specific to this project?
Comments	The Program Manager and Team can add anything they want to say to expedite the decision-making process.

Stage Gate: No 6, Final Approval

All stage gate templates are similar. Here, we will only highlight any differences from what we listed with the first stage gate.

In this case, the stage gate review includes:

- Is there a need for final funding at this stage? ☐ Yes ☐ No
- If yes, funding approved? ☐ Yes ☐ No

Delivery Phase, Delivery Stage

Overview

The Delivery Stage is the most straightforward stage of the program management process. It is primarily about conducting the projects' work.

Stage Deliverable: Delivery Summary

Table 21: Program Method, Delivery Summary (Delivery Stage)

Topic	Instructions
General Statements	The main effort is to complete the deliverables of the various projects.
Deviations and Corrective Actions	As the executing team performs work, they encounter differences (variances from the plan). The program manager and PMT will evaluate these deviations, determine the need for corrective actions, and take the necessary measures to correct them where possible. The variations could be related to any function, such as scope, quality, human resources, and time.
Preventive Actions	In a way, preventive actions can be hidden since they are what the program management team should do continuously; that is the art of proactive program management. The program management team must be diligent to prevent errors, deviations, or incidents.
Program Changes	Managing change is an ongoing effort, and the team must understand the organizational processes to do so. As we stressed earlier, the team should manage a change between the stages and not only during the implementation.
Comments	The Program Manager and Team can include anything they want to add to expedite the decision-making process, deliver the program successfully, and obtain the customer's acceptance.

Stage Gate: No 7, Implementation is Complete

All stage gate templates are similar. Here, we will only highlight any differences from what we listed with the first stage gate. For the program, this gate cannot be closed until all projects are completed and their

final gates approved.

Delivery Phase, PLC Closure Stage

Overview

From a program management perspective, the end of the program is at the end of its **life cycle**, which is the closing stage. However, in the Uruk Framework, we changed the name to the "PLC Closure Stage" to be explicit that this stage only closes the program life cycle. The actual program closure will happen after the final success assessments.

Closing the program life cycle is necessary since keeping the program manager or team members on the program beyond that point would not make sense. However, from an organizational/program owner perspective and per ***the Uruk Framework***, the program ends later.

The program's end (closure) is when the organization, possibly through the Project Management Unit (PMU), performs the final success assessment on all projects.

Special Condition

While working on a program, management could stop/terminate the program for one reason or another. This could happen at any stage gate in the Uruk Way and the Uruk Platform. When management rejects the work or decides to stop a project, the Uruk Platform will lock all the subsequent stages and open the PLC Closure stage so the program team can formally close the program and complete a *Program Termination Report*, which we cover in Part G. In this case, we designate the program as closed, not completed.

Stage Deliverable: Program Completion Report (PCR)

Table 22: Program Method, Program Completion Report (PLC Closure Stage)

Topic	Instructions
Performance Reconciliation	For the program, the team can start with the actions for this item for each project and summarize for the program level.
Captured Lessons Learned Summary	For the program, the team can start with the actions for this item for each project and summarize for the program level.

Topic	Instructions
Program Success (First two Dimensions)	Evaluate the project's success per the four dimensions. We can assess two dimensions at the program's PLC closure. Whatever we cannot measure yet, we will identify potential timing for when the organization can determine.
Future Follow Up	Any future follow-up that might be required in terms of what and when. For example, if we cannot measure product delivery success yet, when do we think we can? Is the same for the project's objectives success? The team should think out of the box and consider anything that could be necessary or nice to pursue in the future – related to this project.
Prepare Files for Archiving	Depending on the organizational policies, the team might need to send the information to the PMU.
Comments	The program manager and team can add anything they want to document for the final closure.

Stage Gate: No 8, Program is Complete

All stage gate templates are similar.

Part E. Simplified Stage Management

Introduction

The Simplified Stage Management processes are based on the concept of the process groups (focused areas). The Uruk Framework, VDM, has modified the five focus areas from PMI to four processes for the Simplified Stage Management and six processes for the Advanced Stage Management, which we cover in the next section.

We do not have a process for Stage Initiation (Authorization) because we consider it part of the approved stage gate.

The following is what we are building in **Stratija**.

Stage Plan

Table 23: Simplified Stage Management, Stage Plan

Topic/Header	Instructions
Team	Add or remove team members, as necessary.
Schedule	Develop and document the stage schedule, or at least the essential milestones.
Cost Estimate	Develop and document the stage cost estimate.
Work Packages	The platform includes the default work packages for each deliverable. Here, we advise the project manager to review the 'stage deliverable' and decide if additional work packages are needed.
Stakeholders	Review and update the stakeholders list to reflect any changes, additions, or deletions.
Risks	Review the project risks and identify any changes or additions related to this stage.
Communication	Identify the communication plan for this stage, or update the project communication plan.
Physical Resources	Identify any requirements or plan for physical resources.
Procurement	Identify any procurement requirements and develop the stage procurement plan.

Stage Implementation

We do not have a separate deliverable for the Stage Implementation. We only have the stage deliverable and its work packages. For these, refer to the templates from the different tailored methods.

Stage Control

Depending on your organizational project management system, stage control could include many variables. Technically, every topic that you include in the Stage Plan should be monitored and controlled.

In Stratija, per the MVP (initial version), we are overseeing stage control as a journal entry, where the project manager can add items, and each item will be a unique entry.

Stage Closure

Table 24: Simplified Stage Management, Stage Closure

Topic/Header	Instructions
Close Contracts	Close any open contracts, if completed, and if any were issued for this stage.
Summarize Captured Lessons	If there are any open captured lessons, finalize and submit them to the CLL database. Also identify and document any additional lessons learned.
Reconcile Stage Work	Reconcile is the term we use to explain the stage (project) story and what happens from the plan to the final work.
Assess Stage Success	If you have defined stage success criteria, then perform the assessment. If not, then review in comparison to project success criteria and include any additional information.
Final Comments	Open field for the project manager and team to add any relevant comments.

Part F. Advanced Stage Management

Introduction

The Advanced Stage Management processes are based on the concept of the process groups (focused areas). The Uruk Framework, VDM, has modified the five focus areas from PMI to four processes for the Simplified Stage Management and six processes for the Advanced Stage Management, which we cover here.

The following is what we are building in **Stratija**.

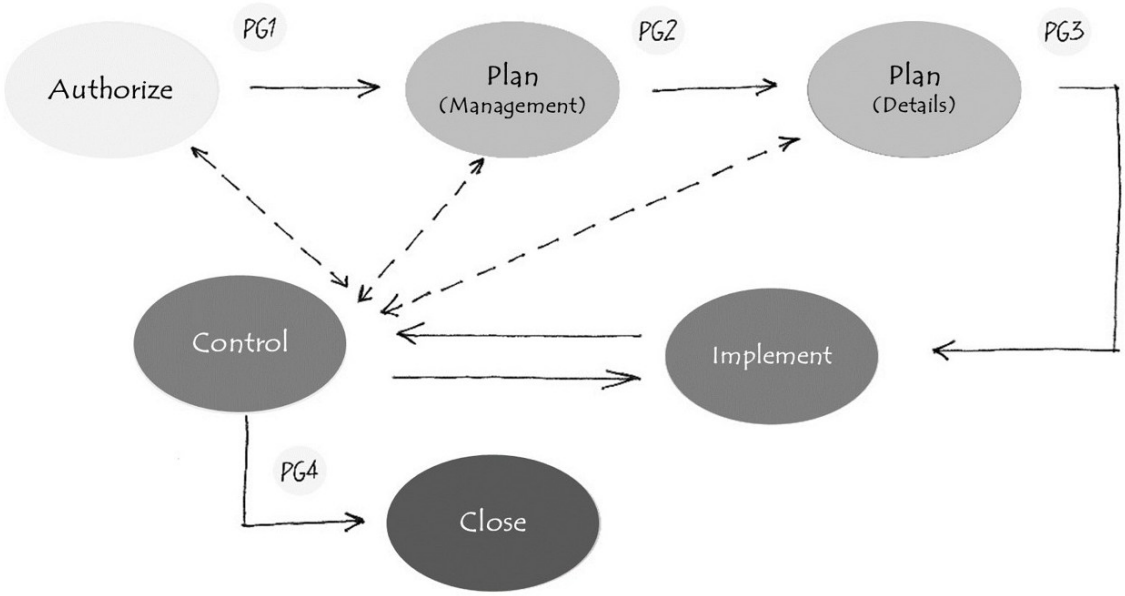

Figure 6: VDM – Stage Management Processes

Stage Authorization Document

Table 25: Stage Authorization Document

Topic/Header	Instructions
Select or Replace Project Manager	At project activation, the sponsor selects a project manager. However, in every stage, there is a chance to change the project manager.
Identify Stakeholders	Identify all stakeholders and include any information that would be helpful.
Establish Success Criteria	Establish the success criteria for the project, in accordance with the Four Dimensions of Project Success.
Document the stage authorization	Document the stage authorization and include any necessary guidelines or instructions.
Comments	Add any comment that might help with the gate review.

Stage Management Plan

Table 26: Stage Management Plan

Topic/Header	Instructions
Mobilize the management team	Add the necessary project management team members.
Develop a management plan	Include any information or actions to document how to manage the work.
Develop a change management plan	Include any information about how to manage change.
Develop a control plan	Include any information about how to monitor and control the work.
Develop a configuration management plan	Include any information to help with configuration management.
Develop the initial schedule	Develop the initial schedule, which would be updated with the Stage Detailed Plan.
Develop the initial cost estimate	Develop the initial cost estimate, which would be updated with the Stage Detailed Plan.
Comments	Add any comment that might help with the gate review.

Stage Detailed Plan

Table 27: Stage Detailed Plan

Topic/Header	Instructions
Outline the detailed plan	This template already includes an outline. Modify it, if necessary.
Mobilize the detailed planning team	Mobilize the technical team members who can help develop the Stage Detailed Plan.
Explore expectations and define requirements	Explore the stakeholders' expectations to help understand their needs and requirements.
Create PBS and WBS	Start by creating the PBS to help visualize the final product, then create the WBS to help with the scope of work.
Develop the scope of work	This would be the written text to explain the work packages per the WBS.
Develop a schedule	Develop the schedule that aligns with the WBS and scope of work.
Develop cost estimate	Develop the cost estimate that aligns with the WBS and scope of work.
Risk Management	Identify, assess, and plan responses to the various threats and opportunities.
Define quality standards	Define quality standards and how to comply with them.
Define process improvements	Define any process improvement needs, and how to achieve them.
Define HSSE compliance requirements	Define the HSSE compliance requirements and how to comply with them.
Determine roles and staffing	Determine the various roles, staffing plan, and the responsibility assignment matrix.
Develop stakeholder engagement	How to engage with the various stakeholders to ensure success.
Develop communication plan	Develop the communication plan for the team, management, and, if necessary, external communication.
Develop (physical) resource plan	Identify the required resources and how to acquire them.
Develop procurement plan	If there is a need for procuring services or goods, then develop the procurement plan.
Comments	Add any comment that might help with the gate review.

Stage Implementation Summary

Table 28: Stage Implementation Summary

Topic/Header	Instructions
General Statements	The main effort is to complete the deliverables (work packages) that the team outlined in the *Project Plan*.
Deviations and Corrective Actions	The project manager and team will evaluate these deviations, determine the need for corrective actions, and take the necessary measures to correct them where possible.
Preventive Actions	In a way, preventive actions can be hidden since they are what the project management team should do continuously; that is the art of proactive project management. The project management team must be diligent to prevent errors, deviations, or incidents.
Project Changes	Managing change is an ongoing effort, and the team must understand the organizational processes to do so. As we stressed earlier, the team should manage a change between the stages and not only during the implementation.
Are there exceptions?	Identify any items that do not comply with the plan and list them.
Complete critical items	Any notes that would help complete the critical items?
Complete exception Items	Any notes that would help complete the exception items?
Comments	Add any comment that might help with the gate review.

Stage Control

No need for any additional information.

Stage Completion Report

Table 29: Stage Completion Report

Topic/Header	Instructions
Validate product	Verify and validate that the output, the product, is completed per the plan and specifications.

Topic/Header	Instructions
Close resources	Ensure the proper closure of any outstanding matters.
Close contracts	Ensure the proper closure of any outstanding contracts.
Document lessons learned	Summarize and document all captured lessons learned.
Reconcile work	Reconcile the work by documenting the differences from plan to actual.
Assess success	Assess success in line with the established criteria.
Completion report	Finalize the completion report and determine when final closure could happen.
Demobilize the team	Release all remaining team members, ideally with the proper support and recommendation where necessary.
Comments	Add any comment that might help with the gate review.

Part G. Additional Resources – All Tailored Methods

Project Information

The following is not part of a stage. However, it is part of a project set up and should be included in every report.

Table 30: All Project Methods, Project Information

Project Title			
Project Description			
Project Number		Idea Generator	
Date, Added		Date, Activated	
Target Start Date		Target Completion Date	
Organizational Unit		Secondary Unit	
Lower-Level Unit		Aligning with Strategy?	□ Yes □ No □ Not Sure
Project Manager		Project Sponsor	
Part of a Program?	□ Yes □ No □ Not Sure	Program Title	
Planned Completion		Forecast Completion	
Document Date		Document Version	

Program Information

The following is not part of a stage. However, it is part of a program set up and should be included in every report.

Table 31: Program Method, Program Information

Program Title	

Program Description			
Program Number		Idea Generator	
Date, Added		Date, Activated	
Target Start Date		Target Completion Date	
Organizational Unit		Secondary Unit	
Lower-Level Unit		Aligning with Strategy?	□ Yes □ No □ Not Sure
Program Manager		Program Sponsor	
Planned Completion		Forecast Completion	
Document Date		Document Version	

Project Authorization Document

The information provided with the stage gate output might be enough for some projects. However, some organizations might prefer to issue a Project Authorization Document (PAD). The PAD summarizes essential points from the project brief and feasibility study report.

Table 32: All Methods, Project Authorization Document[10] (PAD)

Topic	Instructions
Product Description	The product description elaborates on the project brief and feasibility study, which describes the project's output in more detail than the project brief.
Project Justification	This section also elaborates on the project brief and feasibility study. The project justification describes the project's purpose and drivers.
Location	The location considerations for the project, if applicable.
Time/Duration	The project duration and expected completion date. It is vital to stress whether the completion date is a target date (preferred) or a constraint (fixed).
Project Total Cost	State the project's rough order of magnitude estimate. Same as project duration; is this a constraint or a target?
Project Manager	Assign the project manager and define his/her authority. The Uruk Way preference is to have the project manager on board from the start of the project in the concept stage.

[10] All of these templates – deliverables – can be used for a project or a program

Topic	Instructions
Assumptions	What assumptions must the team make to proceed? We do not know them yet, but we need to take a position for the team to move forward. If the team does not address them promptly, assumptions could become risks.
Constraints	Constraints are restrictions imposed by management, clients, and nature, among other factors. They limit our ability to complete the project as we wish. Examples: time or cost constraints are set to limit, not to exceed. Weather constraints: cannot work between 12:00 and 15:00 outdoors during the summer months.
Major Risks	List any identified significant risks from the feasibility study and others.
Stakeholders	List all the project stakeholders. All of those with interest or affected by the project.
Project Success	Include the criteria for assessing project success. We recommend using Uruk's Four Dimensions of Project Success model.

Project Termination Report

If a project is terminated at any stage, we recommend completing a Project Termination Report (PTR) instead of a Project Completion Report.

Table 33: All Methods, Project Termination Report (PTR)

Topic	Instructions
Executive Summary	Document the original intent, what changed, the termination decision, and the headline recommendation(s).
Termination Decision and Authority	The trigger, who made the call, and through what governance mechanism. This is the section that proves it was a formal, deliberate decision, not drift or informal abandonment.
Reasons for Termination	Neutral, categorized account of why: strategic/business case change, external constraints (funding, market, regulatory), execution or performance issues, or a combination. Framing this as categories rather than a single narrative keeps space for "nobody did anything wrong" as a legitimate outcome.
Timeline of Key Events	Condensed project history and decision points, showing where and when the path diverged from plan
Value and Cost Accounting at Termination	Value actually delivered or realized vs. planned, spend vs. budget, salvage/sunk-cost position. This is where a well-run-but-terminated project gets to show it was not wasted effort, if applicable.
Lessons Learned	Specific, actionable findings for future projects and programs.

Topic	Instructions
Governance and Methodology Recommendations	Organizational-level takeaways: OPMS, stage-gate criteria, PMU practice, or governance process changes this termination surfaces.
Disposition of Assets, Contracts, and Team	Closeout mechanics, closing contracts, team, and any other relevant information.
Comments	The project manager and team can add anything they want to document for the final closure.

Advanced Funding Request

For capital projects, there may be a need for advance funding to cover increasing expenditure, which may include placing orders for long-lead items.

Table 34: MLP Methods, Advanced Funding Request (AFR)

Topic	Instructions
Purpose of Request	Explain why funding is needed ahead of the normal stage-gate funding cycle, e.g., long-lead procurement, outsourced stage work, or a definition effort that exceeds the operating budget.
Stage/Context	Identify the current stage and the stage gate this request supports.
Amount Requested	State the amount and currency, and whether it is a firm figure or an estimate.
Funding Source	Identify where the funds will come from (capital budget, operating budget, external financing) and any approval chain specific to that source.
Time Period Covered	State the period the advance funding covers and when it will be reconciled against the full budget.
Risk if Not Approved	Explain the consequences of delay: schedule slip, lost pricing, loss of a vendor slot, etc.
Comments	Any additional comments from the project or program manager.

Final Funding Request

Table 35: All Methods, Final Funding Request (FFR)

Topic	Instructions
Purpose of Request	State that this is the request for full project/program funding authorization, typically issued at Final Approval (Final Investment Decision), based on the Project or Program Detailed Plan.
Total Cost	State the total approved cost estimate from the Detailed Plan, referencing the latest estimate and the Time-Phased Budget.
Funding Source(s)	Identify all funding sources and the proportion coming from each.
Phasing	Reference the Time-Phased Budget to show how funds will be drawn down over the delivery phase.
Contingency	State the contingency amount included and the basis for it (e.g., risk register, quantitative risk analysis).
Prior Advanced Funding	If an Advance Funding Request was approved earlier, reconcile it against this final request.
Comments	Any additional comments from the project or program manager.

Project Status Report

Table 36: All Methods, Project Status Report (PSR)

Topic	Instructions
Reporting Period	State the period this report covers.
Overall Status	☐ On Track ☐ At Risk ☐ Off Track — with a one-line explanation.
Schedule Status	Planned vs. actual progress; forecast completion date if it has changed.
Cost Status	Planned vs. actual spend; forecast at completion if it has changed.
Scope Status	Any scope changes approved or pending since the last report.
Key Accomplishments	What was completed this period.
Issues & Risks	New or escalating issues and risks, with owner and target resolution date.
Upcoming Period Plan	What the team plans to accomplish next period.

Topic	Instructions
Decisions Needed	Anything requiring sponsor or governance input to keep the project unblocked.
Comments	Any additional comments from the project or program manager.

Critical Items Report

The purpose of this report is to track any critical items identified during the handover process that must be resolved before Provisional Acceptance is granted. Ideally, this can be a table with the fields as shown below.

Table 37: All Methods, Critical Items Report (CIR)

Topic	Instructions
Date Identified	The date the item was identified
Item Description	For each item: description, location/system, severity (critical/minor), owner, target completion date, verification method.
Location/System	
Severity	
Owner	
Target Completion Date	
Verification Method	
Verification	Confirm who verifies closure and any additional comments.
Comments	Any additional comments from the project or program manager.

Snag Items Report

The purpose of this report is to track outstanding punch-list/snag items identified at or before Provisional Acceptance that must be resolved before Final Acceptance. Ideally, this can be a table with the fields as shown below.

Table 38: All Methods, Snag Items Report (SIR)

Topic	Instructions
Date Identified	The date the item was identified
Item Description	For each item: description, location/system, severity (critical/minor), owner, target completion date, verification method.
Location/System	
Severity	
Owner	
Target Completion Date	
Verification Method	
Verification	Confirm who verifies closure and any additional comments.
Comments	Any additional comments from the project or program manager.

Provisional Acceptance

The operating team issues provisional acceptance to indicate that all the operational readiness and implementation work is essentially complete and any critical items have been resolved. This could be for the entire project or specific systems.

Table 39: All Applicable Methods, Provisional Acceptance

Topic	Instructions
Deliverable Description	Identify what is being transferred to the operating organization.
Basis for Acceptance	Reference the Operational Readiness Summary and Handover Package that formed the evidence base.
Handover Package Confirmation	Confirm the operating organization has received, reviewed, and accepted the Handover Package (as-built drawings, O&M manuals, training records, warranties, etc.) as complete and fit for purpose.
Outstanding Items	Reference the Snag Items Report; list any punch-list items or commissioning/ startup activities still open.
Conditions of Acceptance	State that acceptance is provisional pending resolution of outstanding items and completion of commissioning, startup, and performance testing.
What This Acceptance Does — and Does Not — Confirm	Clarify: Provisional Acceptance transfers custody of the deliverable to the operating organization; it does not close the project team's accountability. Final Acceptance does that.

Topic	Instructions
Comments	Any additional comments from the operations manager.

Final Acceptance

The operating team issues the final acceptance to indicate that: (1) all the implementation work is complete, (2) all snag list items are also complete, and (3) all commissioning/start up work is also complete. This could be for the entire project or specific systems.

Table 40: All Applicable Methods, Final Acceptance

Topic	Instructions
Reference to Provisional Acceptance	Confirm the date Provisional Acceptance was granted and that custody has been with the operating organization since.
Performance Evidence	Attach or reference the Performance Test Report (where a formal test protocol applies) or the Operational Performance Report (where it does not), showing actual performance against the criteria in the business case and Project Detailed Plan.
Snag List Closure	Confirm all Snag Items Report items have been resolved and verified by the operating organization — not the project team's self-assessment.
Warranty & Contractual Obligations	Confirm any outstanding warranty or contractual performance requirements have been satisfied or are formally tracked beyond this point.
Technical Success Confirmation (Dimension 1)	State that the deliverable performs as designed and meets specifications; this is what Final Acceptance formally confirms. Note explicitly that it does not confirm value realization (Dimensions 3–4); that is assessed later in the Final Assessment Report.
Comments	Any additional comments from the operations manager.

Final Assessment Report

This is the report issued after all success dimensions have been assessed.

Table 41: All Methods, Final Assessment Report (FAR)

Topic	Instructions
Reference to PCR	Summarize the assessment of Dimensions 1–2 (schedule/budget/scope delivery success).
Dimension 3 Assessment	Product Delivery Success: Is the deliverable working for the operating organization under sustained, normal operation? This typically requires six to eighteen months or more of operational evidence, not just the moment of Final Acceptance.
Date of D3 Assessment	Input the date when this assessment was completed.
Dimension 4 Assessment	Objectives Success: compare actual outcomes (revenue, market share, strategic positioning, etc.) against the original business case's full value case. This is organizational leadership work, owned by the operating organization and governance body, not the (by now disbanded) project team.
Date of D4 Assessment	Input the date when this assessment was completed.
Additional Lessons Learned	Any lessons discovered after PLC Closure that were not captured in the PCR.
Governance Recommendations	Recommendations for changes to the governance framework, including the Organizational Project Management System, arising from this project's experience.
Produced By	The operating organization, business unit, asset management function, or executive leadership that accepted accountability at the final stage gate.
Reviewed/Accepted By	The organizational governance body, typically the same body that made the original Final Investment Decision. This acceptance is the project's final formal governance event.
Comments	Any additional comments from the review body.

Project Closeout Report

Table 42: All Methods, Project Closeout Report (PCOR)

Topic	Instructions
Outcome	☐ Full Closure (project reached Final Acceptance) ☐ Terminated/Abandoned before Final Acceptance.
Components Included	If full closure: attach/reference the Project Completion Report (PCR) and the Final Assessment Report (FAR). If terminated: attach/reference the PLC Closure documentation and the Project Termination Report (PTR).

Topic	Instructions
What This Documents	For full closure: Dimensions 1–4, the complete value case. For termination: reasons for termination, lessons learned, and governance recommendations, without a value assessment.
Produced By	For full closure: project team (PCR) plus operating organization (FAR). For termination: project team, with governance body oversight.
When Produced	For full closure: PCR at PLC Closure, FAR after sustained operations. For termination: at or shortly after the termination/abandonment decision.
Reviewed/Accepted By	Governance body, for both documents/scenarios.
Closing Statement	A short statement of what this PCOR closes — the project's full accountability story, whether that story ends in a completed value case or a formally documented termination. Every project closes with a PCOR; there is no scenario in which a project simply stops without one.
Comments	Any additional comments from the governance body.

Part H. Other Templates[11]

Captured Lesson Form

Lesson Learned Form

[11] These are templates that are not specific to a method. They are likely for project management supporting actions, which we will add in future editions of this guide.

Closing Comments

In this document, we shared templates for the various stage deliverables and gates. We did not include any templates for supporting actions (e.g., cost or risk) or industry-specific projects (technology, facilities, etc.). However, these generic templates are excellent starting points for most projects, regardless of size or domain. We have used them on several types of projects. In some domains, the name of the deliverable could be different, but the content of the deliverable can be pretty similar.

In conclusion, you can use these templates to build your method, including the project or program life cycle, deliverables, and decision points. As you develop your bespoke method, you can delete what you do not need and add what we missed.

We wish you success today, tomorrow, and always!

Appendices

Acronyms & Abbreviations

Abbrv	Full Term
AFR	Advanced Funding Request
CII	Construction Industry Institute
CIR	Critical Items Report
E1	Estimate 1
E2	Estimate 2
E3	Estimate 3
EPT	Extended Project (or Program) Team
FAR	Final Assessment Report
FEED	Front-End Engineering Design
FFR	Final Funding Request
FID	Final Investment Decision
FSR	Feasibility Study Report
GPM	Green Project Management
IOS	Initial Operations Summary
IPMA®	International Project Management Association
IS	Implementation Summary
ISO	International Organization for Standardization
MLP	Medium to Large Projects
OPM	Organizational Project Management
OPMS	Organizational Project Management System
ORS	Operational Readiness Summary
PAD	Project (or Program) Authorization Document
PB	Project (or Program) Brief
PBS	Product Breakdown Structure
PCOR	Project (or Program) Closeout Report
PCR	Project (or Program) Completion Report
PDP	Project (or Program) Detailed Plan

Abbrv	Full Term
PDS	Product Delivery Summary
PG	Process Gate
PLC	Project (or Program) Life Cycle
PMB	Performance Management Baseline
PMI®	Project Management Institute
PMP	Project (or Program) Management Plan
PMT	Project (or Program) Management Team
PMU	Project Management Unit
PRD	Project (or Program) Requirements Document
PSD	Program Strategy Document
PSR	Project Status Report
PTR	Project (or Program) Termination Report
RACI	Responsible, Accountable, Consulted, and Informed
RAM	Responsibility Assignment Matrix
SAD	Stage Authorization Document
SCR	Stage Completion Report
SDP	Stage Detailed Plan
SG	Stage Gate
SIR	Snag Items Report
SMP	Stage Management Plan
SSP	Small-Simple Projects
TM	Tailored Method
TPB	Time-Phased Budget
VDM	Value Delivery Methodology
WBS	Work Breakdown Structure