

Approach Selection & *Tailoring Worksheet*

Chooses the delivery approach (predictive, hybrid, or adaptive) from evidence, and records how standard practices are tailored to fit this project.

USE WHEN	OWNER	APPROACH	TIER
After the business case is approved, before the PM plan (T16) is written.	PM prepares with the team · sponsor approves	ALL	Standard

HOW TO USE THIS TEMPLATE

1. Score the four complexity factors with the people who know the work, not alone.
2. Plot the result (section 3) and tick the tailoring drivers that apply (section 4).
3. Recommend one approach. For hybrid, say which workstream runs which way and how they connect.
4. Record each practice you change from the organization's standard, with the reason.
5. Get approval, then carry the results into the PM plan (T16, sections 2 and 3).
6. Delete guidance text (*italic*) before sharing.

Terms. The **development approach** is how the product is built: predictive (plan up front), adaptive (plan and deliver in short cycles), or hybrid (a mix). **Tailoring** is adapting standard practices to fit the project's size, risk, and setting. The complexity zones in section 3 are adapted from the Stacey Complexity Model as shown in the PMI Agile Practice Guide.

Project name	
Linked business case (T05)	
Prepared by · contributors	
Version · date	

1 Project snapshot

The facts that shape the choice. Keep each to one line.

What is being delivered	
Size · duration	☐ Small ☐ Medium ☐ Large
Fixed deadline? · date and reason	
Compliance or contract constraints	
Team and vendor experience	

2 Complexity assessment

Score each factor 1 to 5, where higher means more complex. Use the anchors for 1, 3, and 5; 2 and 4 sit between them. Write the evidence behind each score. Test: someone who disagrees with a score can see why you chose it.

FACTOR	1 · LOW	3 · MEDIUM	5 · HIGH	SCORE	EVIDENCE
Requirements clarity	Clear, written, unlikely to change	Main needs known; details will emerge	Unclear; will be discovered as we go		
Stakeholder agreement	Stakeholders agree on goals and priorities	Broad agreement; some open disputes	Strong disagreement or no clear decision maker		
Technology certainty	Proven, familiar technology	Known technology, new to us or newly combined	New, untested, or unproven integration		
Risk exposure	Low stakes; mistakes are cheap to fix	Moderate financial, client, or compliance exposure	High exposure: regulated data, safety, fixed launch, reputation		

3 Complexity zone

Agreement axis = the average of requirements clarity and stakeholder agreement. Technology axis = the technology certainty score. Find the zone in the table and tick it. Risk exposure doesn't move the zone; a score of 4 or 5 means keep predictive controls (gates, sign-offs) on the high-risk parts, whatever the zone. The score bands are a practice rule of thumb, not a PMI standard.

Agreement axis · technology axis

TICK	ZONE	WHEN IT APPLIES	APPROACH THAT USUALLY FITS
☐	Simple	Both axes 2 or lower	Predictive: plan once, deliver to the plan.
☐	Complicated	Both axes 3 or lower, not simple	Predictive with expert analysis, or hybrid where some parts are uncertain.
☐	Complex	Either axis above 3, not chaotic	Adaptive, or hybrid when parts of the work are fixed or regulated.
☐	Chaotic	Both axes above 4	Stabilize first: short experiments, then reassess before committing budget.

WHAT THE ZONE AND RISK SCORE MEAN FOR THIS PROJECT

4 Tailoring drivers

Tick each statement that is true for this project and add a note. The third column shows which way it usually pushes. Mixed ticks are normal; they are the reason most projects end up hybrid.

APPLIES DRIVER	USUALLY POINTS TOWARD	NOTE
☐ Requirements are likely to change or emerge during the work	Adaptive	
☐ The deliverable can be released in usable pieces	Adaptive	
☐ Users or a product owner can give feedback every few weeks	Adaptive	
☐ The team has worked in iterations before	Adaptive	
☐ The team can collaborate daily (same place or online)	Adaptive	
☐ There is a fixed date or event that cannot move	Either: fix the date, flex scope	
☐ Regulatory, legal, or contractual controls apply	Predictive controls	
☐ A vendor contract fixes scope or price	Predictive	
☐ Governance expects phase gates and approved baselines	Predictive or hybrid	
☐ Funding is released in stages	Either	
☐ Failure would harm clients, safety, or reputation	Predictive controls	
☐		

5 Recommended approach

Tick one. Give two or three reasons that point back to sections 2 to 4, and say why the other options lost. Name what would make you revisit the choice.

☐ Predictive ☐ Hybrid ☐ Adaptive

Rationale	
Options rejected and why	
Revisit the choice if	

6 Hybrid workstream split ADAPTIVE / HYBRID ONLY

List each workstream, how it runs, and its rhythm (for example, phase gates or two-week sprints). Then say how the workstreams connect: shared milestones, which gates apply to the adaptive work, how progress is reported in one view, and who decides on backlog changes versus baseline changes.

WORKSTREAM	APPROACH	CADENCE	REASON

How the workstreams connect

7 Tailoring decisions

Write the organization's standard, what this project will do, and why ("As standard" if unchanged). Test: every change has a reason a sponsor would accept and is the lightest option that still controls the risk.

PRACTICE AREA	ORGANIZATION STANDARD	TAILORED CHOICE	REASON
Life cycle and gates			
Planning and baselines			
Requirements and scope			
Schedule and cost tracking			
Change control			
Risk management			
Quality and acceptance			
Reporting			
Documentation set			

8 Approval

The sponsor approves the approach. A named product owner signs too, since the adaptive work depends on their time.

Decision · date · T16 version

Project manager signature · date

Product owner signature · date

Sponsor signature · date

COMPLETED EXAMPLE · ILLUSTRATIVE

Client Onboarding Portal · Northfield Creative Group (fictional marketing and design agency)

Prepared by Amy Price with Marcus Reyes, Priya Shah, and Elena Torres · v1.0, January 21, 2027 · approved by Dana Whitfield January 26, 2027 · carried into PM plan (T16) v1.0.

FACTOR	SCORE	EVIDENCE
Requirements clarity	3	Contract and privacy rules are known; portal screens will be found with coordinators.
Stakeholder agreement	3	Goal agreed; four studios onboard clients four different ways.
Technology certainty	4	Proven platform, but the CRM integration is untested (T04 open question).
Risk exposure	4	Client personal data; launch must beat the summer season.

Zone: agreement axis 3.0, technology axis 4 = **Complex**. Risk 4 means gates and sign-offs stay on contracts, privacy, and data migration. T03 also pointed to hybrid. **Drivers ticked:** requirements emerge, usable pieces, product owner feedback, fixed date (Jun 1), compliance, fixed-price vendor, gates expected.

Recommended: Hybrid. Fully adaptive would leave the privacy and contract work without the sign-offs it needs; fully predictive would fix the portal screens before coordinators have seen them. **Revisit if** the CRM integration fails its first test or the security review moves.

WORKSTREAM	APPROACH	CADENCE	REASON
A. Contracts, privacy, data migration	Predictive	Phase gates	Regulated data; needs approved baselines.
B. Portal interface	Adaptive	Two-week sprints	Screens found with users; Marcus Reyes is product owner.
C. Training and adoption	Predictive	Planned, tested at sprint reviews	Fixed dates before go-live.

How they connect: shared milestones (requirements baselined Feb 5, security review Apr 9, UAT May 21, go-live Jun 1); one weekly status report with a release burnup for B; monthly steering committee. Backlog order within a release is Marcus Reyes's call; baseline changes go through a change request (T65). **Reading the example:** the scores, not habit, drove the choice.

PRACTICE AREA	STANDARD	TAILORED CHOICE	REASON
Life cycle and gates	Gate at each phase end	Three gates: requirements baseline, security review, go/no-go	Control where the risk sits
Planning and baselines	Full baselines up front	Baselines for A and C; B planned by release and sprint	Portal scope will emerge
Schedule and cost tracking	Earned value on all work	Earned value for A and C; release burnup for B	Earned value adds little to sprints
Change control	Change request for all changes	CR for baselines; product owner reorders backlog	Keeps sprints moving
Documentation set	Full plan for every area	Full: risk, procurement, benefits, change. Short form: communications, stakeholders	Medium project, 24 weeks