## ITS Project Classification—Methodology Requirements Matrix

*Key: R=Required; E=Recommended; O=Optional; n/a=not applicable*

<table>
<thead>
<tr>
<th>Phase</th>
<th>Artifacts</th>
<th>Activity</th>
<th>Project Class</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>1  2  3  4  5</td>
</tr>
</tbody>
</table>
| Define | Project Proposal | Develop Project Proposal | O  E  R  R  R  
|        |           | Problem/Opportunity Statement | R  R  R  R  R  
|        |           | Goals and Objectives | R  R  R  R  R  
|        |           | Estimated Schedule and Budget | R  R  R  R  R  
|        |           | Assign Project Class | R  R  R  R  R  
|        |           | Assign Project Manager | R  R  R  R  R  
|        |           | Phase Gate – Initial Sponsor Approval | R  R  R  R  R  
|        |           | Assign Project Core Team | R  R  R  R  R  
| Plan   | Project Charter | Develop Project Charter | O  E  R  R  R  
|        |           | Work Plan (WBS) | O  O  R  R  R  
|        |           | Resource Plan | O  O  R  R  R  
|        |           | Risk Management Plan | E  E  R  R  R  
|        |           | Communications Management Plan | R  R  R  R  R  
|        |           | Project Budget | R  R  R  R  R  
|        |           | Issue Management Plan | E  E  R  R  R  
|        |           | Procurement Plan | R  R  R  R  R  
|        | Resource Assignments | Technical Review | R  R  R  R  R  
|        |           | Exec Sponsor Review/Funding Approval | R  R  R  R  R  
|        |           | Phase Gate – SMT Approval | O  O  R  R  R  
|        |           | Team Assignments | E  E  R  R  R  
|        |           | Conduct Sponsor Review/Funding | E  E  R  R  R  
|        |           | Phase Gate – Sponsor Approval | R  R  R  R  R  
|        |           | IT Project Governance | n/a n/a R  R  R  
|        |           | Phase Gate – Project Approval | R  R  R  R  R  
| Launch |          | Launch Kick-off Meeting | E  E  R  R  R  
|        |          | Initial Risk Review | E  E  R  R  R  
|        |          | Phase Gate- Resources Available and Final Schedule | R  R  R  R  R  
| Manage | Issues/Risk Log | Project Plan Review and Assessment | E  E  R  R  R  
|        | Status Report | Schedule Management | E  E  R  R  R  
|        | Project Change Control | Project Change Control Management | R  R  R  R  R  
|        |           | Cost Management | R  R  R  R  R  
|        |           | Risk Management | E  E  R  R  R  
|        |           | Issues Management | E  E  R  R  R  
|        |           | Internal and External Communications | E  E  R  R  R  
|        |           | Phase Gate – Implementation Approval | R  R  R  R  R  
| Close  | Project Closure Review | Transition to Production | R  R  R  R  R  
|        |          | Wrap-up Meeting | O  O  R  R  R  
|        |          | Lessons Learned | R  R  R  R  R  
|        |          | Administrative Closure | R  R  R  R  R  
|        |          | Celebrate! | O  O  R  R  R  

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**Note:** The table above outlines the project classification methodology requirements across different phases, with each requirement marked as required (R), recommended (E), optional (O), or not applicable (n/a). This matrix helps in identifying the necessary artifacts and activities for each phase of the project, ensuring a structured and comprehensive approach to project management.