Tailoring Guidelines

Revision History:

Version	Date	Prepared by / Modified by	Significant Changes	Approved By	Approved On
1.0	1-May-2017	Name	First Draft Made	NAME	DATE

Introduction

The objective of this guideline is
- To balance between the project requirements / constraints and the process standards
- To enable the simplification of process approach without affecting the objectives of QMS
- To identify the mandatory requirements that must be satisfied by the tailored process
- To enable the customization

Tailoring Guidelines

QMS Activity	Work products	Tailoring Criteria	Tailoring Description
Project Initiation • Identify the scrum master • Initiate Project Initiation Note (PIN) • Check the suitability or Risks with agile life cycle • Conduct project kickoff meeting	• Scrum Master allocation e-mail • PIN • PIN Approval • Agile Readiness Checklist • Kick off MOM	No Tailoring	NA
Project Planning • Define project plan • Define release plan • Review the project plan	• Project Management Plan • Release Plan (project workbook) • Review Feedback • Approval mail • Risk Tracker	Using any Tool for Agile Implementation	Release plan can be part of the tool
Project Monitoring • Monitor the Sprint • Monitor the Project • Manage the corrective actions • Project Review with Management	• Sprint Workbook • Project Workbook • Minutes of Meeting • Weekly Status Report • Metrics Report • Risk Tracker • Root Cause Analysis Report	Using any Tool for Agile implementation	Some of the elements from Sprint Workbook and Project Workbook can be part of the Tool and rest that were not part of the toll has to be tracked in the same workbooks
Estimation • Select Estimation Method • Perform Estimations	• Project Workbook	Project Environment	Project can chose different Estimation method other than Fibonacci
Configuration Management • Plan for Configuration Management • Manage Configurations • Change management • Configuration Audits • Backup and Restore	• Project Management Plan • CM Audit Report • Backup e-mail • Change Request Form • Project Workbook	Impact of Change Tool Usage	Project May chose to have CR Form filled only in the case if the change has significant impact. But these changes will be tracked in CR log of project workbook. Approach for configuration management can be tailored based on the tool
Sprint Development • Create / Update product backlog • Create Sprint Backlog	• Review Report • Test Log	Team Maturity and Project Complexity	Formal logging of code review outcomes can be done only if the code is

QMS Activity	Work products	Tailoring Criteria	Tailoring Description
• Design • Coding • Code Review • Unit Testing • Build and Integration • Testing • Customer Review / Demo • User Acceptance Testing • Product Release	• Coding Standards • Review Checklist • Defect Logs • Test Plan (Project Plan) • Code • User Manual		significantly changed Testing types can be combined and updated in the test plan Coding standards can be project specific Review checklists can be project specific User manual template could be project specific
Sprint Management • Sprint Planning Meeting • Daily Standup • Sprint Review / Demo • Sprint Execution • Sprint Retrospective • Storyboard	• MOM • Impediments (Project workbook) • Feedback from review (MOM)\ • Retrospective Report • Story Status	Tools	Some of these could be part of the tool if the tool supports
SAM Process • Identification of Acquisition Type • Vendor Requirements • Vendor Selection • Receiving product/service • Vendor Assessment	• Vendor Agreements • Vendor requirement • Vendor Audit Report • Project Management Plan • Vendor Performance		
Requirements and Design • Develop the requirements • Develop the Technical Design	• SRS • Technical Design	Small projects that does not have complex designs	Requirements and Design can be combined into SRS template only.