



Cheat sheet

The Teal Book

From UK Government

The Teal Book is aimed at project delivery professionals in the UK government, but a lot of the advice and guidance put out by the government is universally applicable.

The Teal Book is built around a modular format, designed to be tailored and embedded across organisational layers. It covers :

- Part A: Core delivery in government, including governance, portfolio, programme and project frameworks.
- Part B: Tailoring and adopting the content to different organisational context using a continuous improvement approach.
- Parts C and D: Governance and management practices at portfolio and programme/project levels respectively.
- Part E: Planning and control disciplines including risk, finance, planning, resource and data management.
- Part F: Solution delivery practices such as change management, quality, design, traceability and organisational change.



Delivery Framework: Governance, Portfolio, Programme & Project

Governance & management (Chapter 4) is foundational. Governance sets direction, accountability, decision-making structure, while management handles day-to-day execution. Importantly, they are designed together and aligned with organisational strategy.

At each scale, roles are defined: at portfolio level, governed by a portfolio board and directors; at programme/project level, by sponsoring bodies, senior responsible owner (SRO), project manager and team.

Portfolio management:

- Defines how to prioritise across programmes/projects, make investment decisions, balance change vs BAU, and monitor performance.

- Roles include portfolio director (strategy oversight) and portfolio manager (execution, reporting, benefits realisation).

Programme & project management:

- Built around five iterative management practices: Identifying, Overseeing, Directing, Initiating, Managing (plus Closing & Reviewing). These practices function throughout the entire life cycle, sideways across phases.

Tailoring & Embedding

Rather than a one-size-fits-all manual, The Teal Book offers tools for tailoring:

- Organisations develop their own project delivery framework based on the Teal Book and the Project Delivery Functional Standard.
- That framework is then tailored further for portfolios, programmes, or projects depending on scale, risk, complexity and context.

Embedding requires involvement across stakeholder groups, consistent language, templates, mechanisms for continuous improvement and a governance function (e.g. Centre of Excellence) to oversee adoption.

Planning & Control Functions

- **Planning:**
Early "front-end loading" is emphasised. Integrated planning aligns outputs, outcomes and benefits to cost, schedule, scope and risk. Plans become baselines, then evolve via control mechanisms.
- **Risk Management:**
Risk is defined as uncertainty, encompassing both threats and opportunities. Continuous risk identification and management is mandated. Risk appetite must be understood and embedded in frameworks, with escalation protocols clear.
- **Resource Management:**
Covers planning and allocation of people, facilities, equipment. Important to consider resource types (reusable, replenishable, exhaustible) and tools for capacity planning.
- **Financial Management:**
Ensuring funds are secured, used effectively, reported accurately and governed in line with rules such as the The Green Book framework.
- **Information & Data Management:**
Focuses on transparency, accountability and legal/regulatory requirements.

Emphasises ownership of data, repositories, access control, versioning, retention and traceability.

- **Traceability:**
Mapping relationships between policy, requirements, design and delivery. Includes baselining of deliverables and two-way traceability.

Solution Delivery Practices

This includes design, change, quality and organisational dimensions:

- **Solution Design:**
Strong emphasis on systems thinking—understanding user needs, operating environment, scalability, security, integration, modularity. Design artifacts can include wireframes, prototypes, architecture diagrams.
- **Quality Management:**
Ensures outputs are fit for purpose, verifying and validating solution quality within the delivery context. Quality is proactive, not retrofitted.
- **Organisational & Societal Change:**
Change management is embedded through frameworks aligned to theory of change. Focuses on behavioural aspects, feedback loops, and evaluation planning. Change must interact with stakeholder engagement, communications and delivery strategy.

Practical Tactics & Techniques

- Front-end planning to reduce late discovery of issues; collaborative planning to involve stakeholders and specialists early.
- Risk workshops and continuous risk review sessions foster proactive identification and mitigation.
- Baseline control using traceability matrices supports transparency and change control.
- Lessons-learned and continuous improvement assessments embedded via a feedback mechanism.
- Change behaviour frameworks use feedback loops, stakeholder mapping and behavioural contracts to embed change.
- Governance bodies designed with behaviour and leadership in mind, not just structure—emphasising clarity, accountability and mutual trust.

Key Takeaways

1. Adopt a holistic, systems-oriented mindset: Link business strategy to delivery via traceability, planning and design.
2. Define governance & management in tandem: Roles, frameworks, decision-making, leadership behaviours and assurance must align.
3. Tailor for context: Avoid boilerplate – adapt frameworks, tools and language to organisational size, risk and type.
4. Embed core disciplines: Planning, risk, finance, resources, information and quality are non-negotiables for controlled delivery.
5. Centre users and change: Design solutions and manage change actively—engage stakeholders, track evaluation metrics, feedback loops.
6. Ensure iterative oversight & adaptation: Practices such as reviewing, lessons learned, continuous improvement and feedback loops enable responsiveness.
7. Use visuals: Swim-lanes, management-practice diagrams, tailoring flows help simplify complexity and increase stakeholder alignment.

Access the book for free here: <https://projectdelivery.gov.uk/teal-book/home/>

