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Project Management Template Guide

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About Project Management Template Guide

Thank you for downloading this free Guide from our platform.

This Guide helps you to manage projects more successfully by describing each of the steps in the Project Lifecycle.

Every phase, activity and task are described, helping you to apply a best practice approach to managing your project.

If you want to deliver your projects on time and within budget, then this short guide will give you the knowledge you're looking for.

By reading it you will learn how to initiate, plan, execute and close projects properly.

You'll also learn how to manage time, cost, quality, change, risk and issues. And finally, you'll learn how to manage staff, customers and suppliers.

There you will find a comprehensive suite of templates to help you complete every step in the project lifecycle.

General Information about Project Management

What is a Project?

A project is “a unique endeavor to produce a set of deliverables within clearly specified time, cost and quality constraints”.

Projects are different from standard business operational activities as they:

- Are unique in nature. They do not involve repetitive processes. Every project undertaken is different from the last, whereas operational activities often involve undertaking repetitive (identical) processes
- Have a defined timescale. Projects have a clearly specified start and end date within which the deliverables must be produced to meet a specified customer requirement
- Have an approved budget. Projects are allocated a level of financial expenditure within which the deliverables must be produced to meet a specified customer requirement
- Have limited resources. At the start of a project an agreed amount of labor, equipment and materials is allocated to the project
- Involve an element of risk. Projects entail a level of uncertainty and therefore carry business risk. Achieve beneficial change. The purpose of a project, typically, is to improve an organization through the implementation of business change.
- A product that can be either a component of another item, an enhancement of an item, or an end item.
- A service or a capability to perform a service (e.g., a business function that supports production or distribution)
- An improvement in the existing product or service lines (e.g., A Six Sigma project undertaken to reduce defects); or
- A result, such as an outcome or document (e.g., a research project that develops knowledge that can be used to determine whether a trend exists, or a new process will benefit society).

Examples of projects include, but are not limited to:

- Developing a new product, service, or result;
- Effecting a change in the structure, processes, staffing, or style of an organization;
- Developing or acquiring a new or modified information system (hardware or software);
- Conducting a research effort whose outcome will be aptly recorded;
- Constructing a building, industrial plant, or infrastructure; or
- Implementing, improving, or enhancing existing business processes and procedures.

What is Project Management?

“Project Management is the skills, tools and management processes required to undertake a project successfully”.

Project Management comprises:

- A set of skills. Specialist knowledge, skills and experience are required to reduce the level of risk within a project and thereby enhance its likelihood of success
- A suite of tools. Various types of tools are used by project managers to improve their chances of success. Examples include document templates, registers, planning software, modeling software, audit checklists and review forms
- A series of processes. Various management techniques and processes are required to monitor and control time, cost, quality and scope on projects. Examples include time management, cost management, quality management, change management, risk management and issue management.

Five Process Groups and ten Knowledge Area

- Initiating,
- Planning,
- Executing,
- Monitoring and Controlling,
- Closing.



Project Management Templates

Project management templates were created by an experienced. They're designed to save project management time, trigger next steps and better organize the user. Every one of these templates are editable and can be easily modified to fit your project needs.

If you're a new project manager, you'll soon discover that you can use templates to save a lot of time.

These templates won't fit every project. Use them as starting points and modify them to fit your project needs. That's why they are editable.



1. Initiating Process Group

The Initiation Phase is the first phase in the project. In this phase a business problem (or opportunity) is identified and a business case which provides various solution options is defined. A feasibility study is then conducted to investigate the likelihood of each solution option addressing the business problem and a final recommended solution is put forward. Once the recommended solution is approved, a project is initiated to deliver the approved solution. A 'Project Charter' is completed, which outlines the objectives, scope and structure of the new project, and a Project Manager is appointed. The Project Manager begins recruiting a project team and establishes a Project Office environment. Approval is then sought to move into the detailed planning phase.

1.1 Business Case Template

What Is a Business Case Template?

A business case is created before a project is ever initiated. It provides the information necessary to determine whether a project is worth the required investment. It does so by presenting the business need and a cost-benefit analysis.

Assume a managed services company regularly receives requests to provide custom software

The business case will also present the benefits and risks associated with each one. Its primary purpose is to consider the options then make a compelling argument for selecting and implementing one of them. Use this business case template as a guide for exploring the various options.

Who Creates the Business Case?

For internal projects, the business case can be written by the person considering the project. If the organizations have a project management office, that responsibility may fall on an internal project or program manager. For external projects, the business case is written by the requesting organization.

What Are the Inputs?

The business case may have a variety of inputs such as: market demands, organizational needs, customer requests, and legal requirements. For example, a customer survey may become an input to a business case that seeks to determine whether a proprietary software application should be updated to new technology.

How Is It Used?

A business case template is a tool that assists in the development of a well-considered business case. The business case is used as an assessment tool. Its primary purpose is to provide the information necessary to determine if a project is justified.

1.2 Project Charter Template

What Is a Project Charter Template?

The Project Charter is a project initiation document that's developed before a project ever begins. It serves two primary purposes:

- 1) It provides a high-level definition of the project requirements and
- 2) It formally authorizes the existence of the project. The free project charter template below provides for these two purposes.

Because the project charter is produced before the project begins, often only high-level projects requirements are listed. Where more detailed information is known, it's set forth in the charter. Among other items, the project charter will describe the project scope, deliverables, schedule, budget, resource requirements, risks, constraints and completion criteria.

Besides providing authorization to apply organizational resources to the project, the project charter names the project manager. In addition, it sets forth known stakeholders.

Most importantly; however, the project charter sets forth the business objectives and the reasons for undertaking the project. It then links the project to strategic objectives of the organization. In smaller organizations, a project charter may be an informal instruction to begin a project.

Who Creates the Project Charter?

Typically, the Project Charter is issued by the project sponsor; however, it's often created by the project manager.

What Are the Inputs?

Like most project management documents, the inputs to a project charter will vary depending on the organization. Most often, the inputs include the project statement of work, the business case and perhaps a contract.

How Is It Used?

Since the Project Charter is what initiates the project, it's the first document that a project manager reviews for identifying stakeholders, gathering project requirements, defining scope, identifying risk and planning budget. If a Project Charter is not used, there still must be some way of obtaining the same information that a project charter would provide. If there is not, it's the project manager's responsibility to gather the missing information.



1.3 Stakeholder Register Template

What Is a Stakeholder Register Template?

To understand a stakeholder register, it's important to first define the term "stakeholder." The PMBOK Guide defines a stakeholder as a person or organization that is actively involved in the project, or whose interest may be positively or negatively affected by execution or completion of the project. It relates that a stakeholder may also exert influence of the project and its deliverables.

A Stakeholder Register is a project management document that captures the known stakeholders and their identifying information. The free stakeholder register template below captures the stakeholder name, their title or role in the project and their contact information. The template also includes a "notes" section for capturing information like the stakeholders preferred method of communication.

As with every project management document, this template should be customized to fit your project requirements. Note that this template is a register and is not designed for performing stakeholder analysis. Stakeholder analysis will be performed in a separate document.



2.0 Planning Process Group

Once the scope of the project has been defined in the Project Charter, the project enters the detailed planning phase. This involves the creation of a:

- Project Plan (outlining the activities, tasks, dependencies and timeframes)
- Resource Plan (listing the labor, equipment and materials required)
- Financial Plan (identifying the labor, equipment and materials costs)
- Quality Plan (providing quality targets, assurance and control measures)
- Risk Plan (highlighting potential risks and actions taken to mitigate them)
- Acceptance Plan (listing the criteria to be met to gain customer acceptance)
- Communications Plan (listing the information needed to inform stakeholders)
- Procurement Plan (identifying products to be sourced from external suppliers).

At this point the project has been planned in detail and is ready to be executed.



2.1 Statement of Work Template

What Is a Statement of Work Template?

From a contractual perspective, the statement of work (SOW) is a critical project management document because it sets forth the contractual obligations. If you are a vendor or contract project manager, this document may be a part of the RFP (Request for Proposal) you received from your client. Because it typically establishes your legal obligations for performance, it should be referenced throughout the project. Think of it as the holy grail of what must be accomplished. Changes to the statement of work should be reduced to writing and signed by both parties.

The statement of work describes the products or services to be delivered by the project. It captures and defines the work activities, the schedule requirements and the project deliverables.

The statement of work template captures introductory and background information regarding the project. Besides the scope of work, it also captures the period and place of performance, applicable standards for performance, requirements, specific vendor responsibilities, client responsibilities, project risks, assumptions and completion criteria. In addition, this template speaks to payment terms and the procedures for change control. Like all project management templates, it should be modified to fit the project needs.

Who Creates the Statement of Work?

For internal projects, the statement of work is created by the project initiator or sponsor. On occasion, the project manager creates it. For external projects, it's received from the client as part of their bid document. For example, it may accompany a request for quote or a request for proposal.

What Are the Inputs?

Inputs to the statement of work may include the business need, the business case, the project scope description and the strategic plan.

How Is It Used?

The statement of work is used to specify the products or services that must be delivered. It defines the boundaries of the project and typically becomes a part of the contract. In most instances, the statement of work is used to create contractual obligations. It becomes a binding contract.

2.2 Change Management Plan Template

What's a Change Management Plan Template?

Change management plan template is designed to assist the planner in developing a subsidiary plan to the project management plan. As it relates to the project management body of knowledge, change management concerns changes to the project scope, to all baselines, project plans and documents. Its primary function is to define the process for monitoring and controlling change on the project.

Effective change management is critical to project success. Changes to scope don't just affect schedule. Change can affect budget, quality, human resource requirements and risk. By monitoring and controlling change, you give your projects more opportunities to succeed.

The change management plan is best developed during the initial project planning stages. By having an approved plan in place, the project will be better positioned to finish on schedule and on budget.

Who Creates the Change Management Plan?

The change management plan is created by the project manager. He or she often receives input and final approval from other project stakeholders.

What Are the Inputs?

Inputs to developing the change management plan include organizational process assets.

How Is It Used?

The change management plan is used to define the processes and procedures used to monitor and control change on the project. When a request for change is contemplated, the change management plan governs what steps must happen before the change is considered and before it becomes approved and implemented.

2.3 Change Request Template

What Is a Change Request Template?

A change request is a request to increase, decrease or modify any document, deliverable, or baseline. It is a formal, written request that occurs after the parameters of the project have been agreed to or baselined and after the project is underway.

The ability to control change is paramount to project success. Without a change control process, the project manager's ability to control scope, schedule, cost and quality is greatly diminished.

The change request form is arguably the most important document in the change control process. It provides a single avenue for requesting a change. Once the change is requested, it becomes sized and either approved, deferred, or disapproved. If approved, the projects plans must reflect the change and the change must be implemented.

This change request template captures a description of the change, the reason for it, sections for impact analysis and a place to record the decision regarding the request. Lastly, this template captures the signature of the person who approved the changed.

Who Creates the Change Request?

A change request can be created by the project manager, the client, the sponsor or another project stakeholder.

What Are the Inputs?

Inputs to a change request include all the monitoring and controlling processes and many of the executing processes. All project planning documents that concern the subject of the change request may become an input.

How Is It Used?

The change request is used to formally request the change. It can include a request for corrective action, preventative action and defect repair. Once complete, it becomes submitted to the change control board for approval or rejection. Like all other work activities, approved change requests become planned, executed, monitored and controlled and closed.

2.4 Change Request Log Template

What Is a Change Request Log?

A change request log is a document that's used to record all change requests that are received during the life of a project. As each change request is received, it becomes logged before it is sized and sent for approval, deferment, or rejection.

Besides providing a place to track every change request received, the change request log is useful for tracing the request from

from approval or rejection through implementation and acceptance. The template below also captures the name of the requestor and, if approved, the implementation due date.

By monitoring the status of every change request received, the project manager is better able to control the project scope, budget, schedule, and quality requirements. At a single glance, he or she can see the status of each request. Timely disposition of every change request is important for the health of a project. The change request log is an important tool for meeting these objectives.

2.5 Requirements Management Plan Template

What Is a Requirements Management Plan Template?

A requirements management plan template is designed to promote consistent analysis, documentation and management of the project requirements. Because it's a template, it prompts the project planner to provide, describe and discuss the same critical information.

The term "requirements" refers to those conditions or capabilities that must be present in a product, a service or a result to satisfy a contractual obligation or other formally imposed specification. Hence, requirements management is paramount to project success.

The requirement management plan is a subsidiary plan of the project management plan. Components of the requirement management plan can describe how the requirements are planned, tracked and reported. They can also provide a description of the configuration management activities, the processes for categorizing and prioritizing the requirements, the product metrics and the desired traceability structure.

Who Creates the Requirements Management Plan?

The requirements management plan is created by the project manager. As with most planning documents, input is gathered from others.

What Are the Inputs?

The inputs to developing the requirements management plan include the project management plan, the project charter, enterprise environmental factors and organizational process assets.

How Is It Used?

The requirements management plan is used to plan the management of the project requirements. The template provides for planning, analyzing, categorizing, prioritizing, quantifying, tracking and reporting the project requirements.

2.6 Requirements Register Template

What Is a Requirements Register?

The Requirements Register or Requirements Log is simply a list of all known requirements. It's the one document that captures them all.

What's a requirement?

A requirement is a condition that must be met or a capacity that a system, service, result or component must have to satisfy a contract, standard, specification or other formally imposed document. Requirements are the quantified and documented needs, wants, and expectations of the sponsor, the customer, and other stakeholders.

This Requirements Register template is rather basic. It captures only the date received, the person or place from whom the requirement was received, the requirement name, its description, and a brief explanation of how the requirement meets a business need or strategic objective. Since this is an editable template, additional columns could be added to extend the functionality of the document. For example, columns could be added to assess the value of delivering the requirement or for assessing the complexity or difficulty of doing so.

Who Creates It?

The Requirements Register is created by the project manager.

What Are the Inputs?

Inputs to the Requirements Register may include, among other things: the project charter, the contract, prototypes, facilitated workshops, surveys, workflow documentation, notes or recordings from interviews, quality requirements, functional requirements, business rules and lessons learned.

How Is It Used?

The Requirements Register is used when identifying and gathering requirements. It's merely a place for listing them all. Requirements may begin as high-level and later become progressively more detailed. Typically, the requirements register is an input to performing requirements analysis. Like most project management documents, the requirements register should be consulted and updated throughout the project life cycle.

2.7 Requirements Traceability Matrix Template

What Is a Requirements Traceability Matrix?

The Requirements Traceability Matrix is a table that captures all known project requirements and traces each one from their origin to the final deliverable. Like the name suggests, it traces the project requirements from beginning to end. This Requirements Traceability Matrix captures the requirement number, the date it was received or identified, the person or place from whom it was received, and a description of the requirement. It also captures the person who approved the requirements, the person responsible for executing the work, the person responsible for testing the correctness and completeness of the requirement, the due date, the person who approved the completed work, and a place for recording the status of the requirement.

At a glance, the Requirements Traceability Matrix allows the project manager to see all the news a person could use. It enables better management of the requirements. For this reason, it's a most useful document.

2.8 Scope Management Plan Template

What's a Scope Management Plan Template?

A Scope management plan template is designed to guide a project manager through development of the scope management plan. It's the template that helps prompt consideration of each of the scope management processes.

When we discuss project scope, we're referring to the sum of all the services, activities, results and products that will be delivered or provided as the project. It's the sum of all the project work.

The scope management plan is a subsidiary plan of the project management plan. It describes how the project scope will be defined. It also describes how it will be developed, monitored, controlled and verified. It's an important planning document because effective scope management is necessary for project success.

Who Creates the Scope Management Plan?

The scope management plan is developed by the project manager. For most projects, the project manager will seek input from others, especially as the project scope is being defined. What Are the Inputs? Inputs to planning scope management include approved subsidiary plans of the project management plan, the project charter, enterprise environmental factors and organizational process assets.

How Is It Used?

The scope management plan is used first to define the scope of the entire project. Through development and approval of the scope statement, the WBS and the WBS dictionary, the project scope becomes baselined. It's used also to validate and control the project scope

2.9 Scope Statement Template

What Is a Scope Statement?

The project scope statement is a description of what the project entails. It sets forth the sum of the products, services and results that will be provided. It includes a description of the major deliverables, the assumptions and the constraints. The scope statement also states the objectives of the project. It describes the business needs. It sets forth how the project will meet those needs

The scope statement lists the benefits of the project and it even describes what the project doesn't include. It lists what must happen for the project to be considered successful and it states the acceptance requirements. Lastly, it provides the estimated schedule, the required resources and estimated costs to complete the project

Who Develops the Scope Statement?

Depending on the project type and the organization, the scope statement may already exist before the project manager is selected. If so, it can be found in the project charter. It may need developed further by the project manager. Where there is no project scope statement, it's the responsibility of the project manager to develop one.

What Are the Inputs?

The inputs to developing the scope statement may include the project charter, the scope management plan, all requirements documentation and organizational process assets.

How Is It Used?

The project scope statement is used to define the project. It's an input to creating the WBS and it's useful in evaluating if to initiate a project. Once the scope statement becomes approved, the approved version is an important part of the scope baseline. Other parts of the scope baseline include the WBS and the WBS dictionary. Because the approved project scope statement becomes a part of the scope baseline, it's an essential tool for monitoring and controlling scope and controlling change.

2.10 Work Breakdown Structure

What Is a Work Breakdown Structure?

The work breakdown structure (WBS) is a hierarchical breakdown of the complete project scope. It presents all the work that will be carried out by the project team during the life of the project, including the project management work. As a hierarchical decomposition of the project work, each descending level of the WBS is increasingly detailed. Let's consider a construction project as an example.

The highest level of the WBS would include the project name. Beneath that, we might find levels like: footer, framing, plumbing, electric, roof and so forth.

In this example, the second level displays the project deliverables. Note; however, that there's more than one way to decompose a project. It could also have displayed the project life cycles on the second level and placed the deliverables on third level.

A work breakdown structure can be constructed in several formats. Among them, it can appear in the form of a flow chart, an outline or a quasi-list. With each of these formats, form follows function. The template below uses an outline or list type of presentation.

Who Creates the Work Breakdown Structure?

The work breakdown structure is created by the project manager with considerable input from the project team members. It's crucial that the project manager seek input from subject matter experts and those performing the work.

Even with input from everyone, full decomposition might not be possible until future work is known or completely understood. As such, the WBS may be revised several times during the life of the project.

What Are the Inputs?

To construct the work breakdown structure, we must know all the deliverables, requirements and the work activities; therefore, inputs include the scope management plan, the project scope statement, requirements documentation, enterprise environmental factors and organizational process assets.

How Is It Used?

The work breakdown structure is an important project management tool. For starters, it helps organize the project. Once constructed, it's used for calculating costs and estimating the project schedule. When the project is underway, it's used for making comparisons. Because the WBS is a part of the scope baseline, it's also relied upon for controlling project scope.

It becomes finalized by assigning a control account (a management control point) to each work package and by establishing a unique identifier for that work package from a code of accounts. Each control account may include one or more work packages, but each of the work pages should be associated with only one control account.

2.11 Work Breakdown Structure (WBS) Dictionary

What Is a WBS Dictionary?

WBS dictionary is a project management document that provides detailed information about each component in the work breakdown structure (WBS). It's an important part of the scope management plan which is a subsidiary of the project management plan. The WBS dictionary template provided below is a somewhat comprehensive one. It captures information regarding the WBS code and the accounting code, the activity name and the work description, the activity predecessor, successor and the dependencies. It captures the resource requirements, assignments, assumptions and constraints, the due date, acceptance criteria, cost estimates and the estimated level of effort.

Along with the approved project scope statement and the work breakdown structure, the WBS dictionary is a part of the scope baseline. Once approved, it can be changed only through formal change control procedures. As such, it's a useful tool for monitoring and controlling scope, cost and schedule.

2.12 Activity Attributes Template

What Is an Activity Attributes Template?

Activity attributes are merely the smaller elements or components that define or describe the schedule activities. Examples of activity attributes include: the activity code that's assigned to it, the activity name, the activity description, the place where the activity must or will be performed, the activity type, assumptions about the activity, constraints, resource requirements, predecessors, successors, logical relationships, and leads and lags.

What's their place in the larger picture? The WBS contains multiple work packages. In each work package, there are one or more activities. Each activity has attributes.

Activity attributes are captured because they assist us in scheduling the project and planning it. For example, when the attributes are captured, we know what activities must happen before the one in question and we know who will perform it.

Who Creates the Activity Attributes Template?

Activity attributes documentation is created by the project manager.

What Are the Inputs?

The activity list is an input to the activity attributes. Likewise, the scope baseline, enterprise environmental factors and organizational process assets are also inputs.

How Is It Used?

The completed activity attributes template is used to develop the project schedule and assist in planning the project.

2.13 Activity Duration Estimates Template

What Are Activity Duration Estimates?

Get started by estimating how long it will take to complete each work activity. It's the first step in accurately estimating the duration of a project.

By estimating activity durations, you improve your chances of developing a reliable project schedule. Our chances are improved because the duration estimates are made at the smallest work level; the activity level. By estimating time at the smallest level of work, project managers are more likely to account for all the work that must be completed.

When making a duration estimate, include the amount of time for completing each activity. Measure from start to finish but don't include any lags. Here, we're only concerned with estimating the duration of each single activity.

Duration estimates aren't always black and white. Occasionally assumptions are made, and resources are changed. Because there are variables, it's a good idea to document how the estimates were determined. The documentation will be useful when performing risk identification.

Who Estimates the Activity Durations?

The person responsible for creating the project schedule is typically the person who estimates activity duration. For most projects, that person is the project manager.

What Are the Inputs?

To estimate activity durations, we need information regarding the project activities. We need to know what they are and how many of them there are. In addition, we need to know the resources assigned to the activities and their availabilities. Likewise, it's most helpful to have some knowledge regarding the past performance of the assigned human resources. Knowing this, it's not difficult to see that inputs to estimating activity durations include the schedule management plan, activity list, activity attributes, activity resource requirements, resource calendars, resource breakdown structure, risk register, enterprise environmental factors and organizational process assets.

How Are They Used?

The activity duration estimates are inputs used to develop the project schedule. The template below provides for single-point estimates only

2.14 Activity List Template

What Is an Activity List Template?

Activity list is a list of all schedule activities that are required on a project. That doesn't really explain much though; does it?

Activities are the portions of work that must be performed to complete the project. They are the items that become sequenced for scheduling. They become estimated for budgeting.

The activity list is simply a place to log all the activities. The list presents the activity number or identifier, the name of the activity, and a detailed description of the activity. The description should sufficiently

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describe the scope of work so that all project team members can understand exactly what must be performed. It also tracks the person(s) responsible for performing the work.

Activities are the very smallest units of work. When decomposing items into activities, the best practice is to involve the team members who will be performing the project work.

Who Creates the Activity List?

The project manager creates the activity list with input from the project team members.

What Are the Inputs?

Inputs to the Activity List include the scope baseline, enterprise environmental factors and organizational process assets.

How Is It Used?

This Activity List template is used for decomposing work packages to specific, well-defined tasks. Once the activities are listed and defined, they can be used to provide a basis for estimating, scheduling, executing, and monitoring and controlling the project work.

2.15 Milestone List Template

What Is a Milestone List?

Milestone list is a project management document that identifies all project milestones. A milestone is a significant event or a point in a project. It represents nothing more than a moment in time; hence, when scheduling, milestones should be assigned zero duration.

Typically, a milestone list indicates whether the milestone is mandatory or optional. An example of a mandatory milestone includes one required by contract. An optional milestone might be one based on historical information.

Who Creates the Milestone List?

The milestone list is generated by the project manager. Like many project documents though, input should be obtained from members of the project team. Inputs to the milestone list include the schedule management plan, scope baseline, enterprise environmental factors and organizational process assets.

2.16 Project Schedule Template

What Is a Project Schedule?

Project schedule is what communicates the planned dates for performing schedule activities and meeting each of the milestones. It indicates the sequence with which activities will be performed and how long it will take to perform each one.

By entering the activities, resources and durations into the scheduling tool, the software generates a schedule with planned dates for completing the activities.

Like most project schedules, this one presents data graphically. The one here allows the user to enter activities or milestones along with their start and end dates.

Who Creates the Project Schedule?

The project manager creates the project schedule; though he or she rarely does so in isolation. A good project manager will consult with the project team members and other stakeholders when determining sequence, estimating durations and identifying constraints.

What Are the Inputs?

Inputs to the project schedule include the activity list, activity attributes, project schedule network diagrams, activity resource requirements, resource calendars, activity duration estimates, project scope statement, enterprise environmental factors and organizational process assets.

How Is It Used?

The project schedule is a planning tool. It's used to plan the sequence and duration of the project activities, from start to finish. Developing it is an iterative process. As more information is known, the schedule becomes revised.

The project schedule is also a monitoring tool. It's used to monitor time. At some point before the project work begins, the schedule becomes "baselined." In other words, it becomes approved and it's used to track progress. What happens is compared to what was agreed upon. These performance results are set forth in each status report.

Think of the project schedule as a living document. It's one that becomes updated throughout the duration of the project. Where change requests increase or decrease the project scope, remember to review the schedule for revisions.

2.17 Schedule Management Plan

What Is a Schedule Management Plan Template?

A schedule management plan template simply provides a consistent format for establishing the policies and procedures used to develop, execute, monitor and control the project schedule. The actual plan itself is a subsidiary plan or a component of the project management plan. It provides answers to essential questions concerning time.

When will the project begin? When will it end? What work will be performed first? What happens if we fall behind schedule? The answers to each of these questions can be found in the schedule management plan.

Though the project schedule is developed during the initial planning phases, mere development doesn't leave the schedule set in stone. The project schedule is managed throughout the life of the project and the schedule management plan explains how that will happen.

Who Creates the Schedule Management Plan?

The schedule management plan is created by the project manager with input from various project stakeholders.

What Are the Inputs?

Inputs to developing the schedule management plan include the project management plan, the project charter, enterprise environmental factors and organizational process assets.

How Is It Used?

As mentioned above, the schedule management plan is a tool used for planning, monitoring and controlling the project schedule. It's the roadmap for moving a project from initial project work to completion.

2.18 Activity Cost Estimates Template

What Is an Activity Cost Estimate?

Begin by estimating the costs associated with performing or completing each work activity. It can feel like a monumental undertaking; however, there's no better way to accurately project budgetary requirements.

Activity cost estimates help reduce cost uncertainty because they break down project costs to the smallest level, the activity level. By starting with the smallest level of work, the project manager creates a granular decomposition of cost that is later rolled up to higher levels to create the project budget.

An activity cost estimate includes those costs associated with all the resources required to complete the activity. The various types of costs might include direct and indirect costs associated with labor, materials, equipment, services, facilities, exchange rates, inflation and allowance.

Generating activity cost estimates isn't always an exact science. Assumptions are made, prices may fluctuate, and the available resources may change. Because uncertainty exists, it's a good practice to retain supporting details of how the estimates were developed. Later, the information will be referenced when performing risk identification.

2.19 Resource Breakdown Structure (RBS) Template

What Is a Resource Breakdown Structure?

Resource breakdown structure (RBS) is a project management document that provides a hierarchical breakdown of resources by category and type. For the purposes of this template, resources include human resources, equipment and supplies.

The resource breakdown structure presents all resources that will be relied upon to complete the project except financial resources. It captures those people, equipment and supplies that represent a cost to completing the project.

In format, the RBS is quite like the work breakdown structure. The template below sets forth the identifying RBS number, the resource category or type and the quantity needed.

Who Creates the Resource Breakdown Structure?

The project manager is the person responsible for creating the resource breakdown structure. Most likely, he or she will gather input from others on the project team.

2.20 Compliance Matrix Template

What Is a Compliance Matrix?

Compliance matrix or compliance traceability matrix is a valuable cross-referencing tool used in proposal development. It assists proposal managers by helping them ensure the proposal is written in compliance with the request for proposal (RFP.) It's an important document because developing a compliant proposal is the critical first step towards winning the bid.

To create one, begin with a thorough reading of the RFP. Starting from the beginning and, in a sequential fashion, each time a proposal requirement is identified, list it on the matrix. The compliance matrix should capture the requirement, the location of the requirement in the RFP, and the location in the proposal where the corresponding response appears.

At the start of writing, the compliance matrix informs the layout of the proposal outline. After the proposal is complete, it becomes a proofing tool. The matrix is used to double check that every RFP requirement found its way into the proposal.

2.21 Quality Requirements

What Is a Quality Requirement?

Quality requirement refers to a condition or a capability that must be present in a requirement. They represent that which is needed to validate the successful completion of a project deliverable. The easiest of quality requirements to capture are the express ones.

Implied quality requirements can be more elusive. Consider a custom web development project where the system is so slow that it's rendered ineffective. There may be no express quality requirements concerning the size or compression of images; however, proper sizing and compression are required for efficient page loads. The implied quality requirement is that the page should function as expected. Break this down further and the quality requirement might dictate that all page's load in X amount of time. This implied quality requirement, now being verifiable, should be captured.

Who Creates the Quality Requirements List?

The quality requirements list is created by the project manager with considerable input from stakeholders and members of the project team.

What Are the Inputs?

There are numerous inputs to creating a quality requirements log. Sometimes, quality requirements concern only the stakeholder expectations. In that case, the stakeholders themselves provide the input.

At other times, quality requirements arise from the need to conform to the law. For example, on a construction project, the building code will set forth the requirements a certified electrician must meet when terminating a circuit.

Inputs may also include the WBS dictionary and the risk register. Any source that might trigger express or implied notice of the level of quality required for a project deliverable or for project acceptance will be an input to developing the quality requirements log.

How Is It Used?

Before we can determine how to meet the quality requirements, we must know what they are. It's here that the quality requirements log begins being useful. At the most basic level, it's a tool used for capturing the identified requirements.

The template adds a little more functionality to the quality requirements list. It captures a detailed description of each attribute, the measurement method that should be used and the acceptable variance. This information is needed when planning quality assurance and performing quality control. In addition, the template below captures the source of the requirements and the date each one was identified or received.

Once the list appears complete, the requirements should be analyzed. Some will be too vague to understand, some might be duplicates, and some might conflict with others. After that, ensure each requirement is quantified. Each quality requirement should be decomposed to a level where it's actionable, measurable and testable.

2.22 Human Resource Attributes Template

What Are Human Resource Attributes?

Human resource attributes are the relevant characteristics that belong to a specific individual who will be performing work on a project. Examples of human resource attributes include a person's relevant degrees or certifications, his or her work availability and prior similar experiences.

By capturing the human resource attributes of each person who will perform work on the project, the project manager is better able to evaluate the strengths and weaknesses of the project team and determine the availability of the right skill sets needed for project success. The documentation aids the project manager in spotting needs for additional training.

The human resources attribute sheets are part of the human resources plan. One should be completed for each project team member. Besides being useful assessment tools, they also capture contact information.

Who Creates This Template?

Inputs to the human resource attributes form include the human resources list and the human resources who will perform work on the project.

What Are the Inputs?

Inputs to the human resource attributes form include the human resources list and the human resources who will perform work on the project.

How Is It Used?

The human resource attributes form is used for determining whether the project team members have the requisite skills, experience and certifications to perform the project work. It also provides the project manager with notice of their availability to work on the project.

2.23 Human Resource Requirements Template

What Are Human Resource Requirements?

Requirement is a capability or condition that must be present to satisfy a specification or a need. Human resource requirements concern the specific capabilities or attributes needed by the people who perform the work of the project.

For example, on a custom software development project, having at least one person with the ability to develop software is a human resource requirement. The ability to develop software is the skill that's required to complete the work of the project.

It might also be a human resource requirement to have someone on the project team with a specific certification. Consider a construction project where certain work activities must be performed by a certified electrician. The human resources requirements of a legal project might involve someone with both a degree and a license. Another requirement might concern their availability.

Who Creates the Human Resource Requirements List?

The project manager creates the human resource requirements list. He or she will also seek input from the project team members.

2.24 Human Resources List Template

What Is a Human Resources List?

human resources list is simply a list of all human resources that will be required on a project. The list captures basic identifying information like the names of the human resources, their roles in the project and their contact information.

The human resource list is a part of the human resources management plan; a subsidiary plan of the project management plan. It provides the project manager with an "at-a-glance" view of all those who will play a role in performing the work of the project.

Who Creates It?

The project manager creates the human resources list.

What Are the Inputs?

Inputs to the human resources list include the activity resource requirements, enterprise environmental factors and organizational process assets

How Is the Human Resources List Used?

The human resources list is used for capturing identifying information about all human resources in one location. It becomes a reference document for future project planning.

2.25 Communication Management Plan Template

What Is Communication Management Plan?

A communication plan, in project management, is a policy-driven approach to a communication providing stakeholders with information about a project. The plan formally defines who should be given specific information, when that information should be delivered and what communication channels will be used to deliver the information.

An effective communications management plan anticipates what information will need to be communicated to specific audience segments. The plan should also address who has the authority to communicate confidential or sensitive information and how information should be disseminated (email, web sites, printed reports, and/or presentations). Finally, the plan should define what communication channels stakeholders should use to provide feedback and how communication documentation will be archived as part of the project records.

Who Creates It?

The project manager creates the communication management plan.

2.26 Meeting Agenda

What Is a Meeting Agenda?

Meeting agenda is the plan for how a project meeting will be managed. That's right. Created properly, it's far more than a list of meeting activities or items that will be up for discussion. Project meetings, and the agendas that announce them, speak to the project culture.

Consider a project meeting that begins late, ends late, rambles on and wastes the time of several individuals. How would it reflect on the project and the person who manages it?

Whether the project meeting is held in person or electronically, a well-organized meeting speaks volumes about the project. It communicates the worth of the project and the fitness of the person managing it. Thankfully, it isn't difficult to run a well-organized project meeting. It does; however, take a little planning.

That planning begins with the meeting agenda template. By relying on a template, you're certain to capture the information you'll need to run an effective meeting.

Who Creates the Meeting Agenda?

The meeting agenda is created by the project manager or any other person responsible for leading a project meeting.

What Are the Inputs?

Depending on the goals and objectives for the meeting, inputs to creating the meeting agenda may include the project management plan including each of the subsidiary management plans, organizational process assets and enterprise environmental factors.

How Is It Used?

First and foremost, think of the meeting agenda template as a planning document. It's one that helps the user prepare for a project meeting.

2.27 Project Status Report Template

What Is a Project Status Report Template?

Project status report template helps project managers prepare clear and concise reports of project status and performance information. Because it's a template, it prompts reporting in a consistent manner.

A project status report provides the reader with insight regarding the health of a project. Typically, it provides an analysis of past performance and an analysis of project forecasts. It does this by reporting work performance information that's gathered during the monitoring and controlling processes. That data comes from validating and controlling scope and controlling: schedule, costs, quality, communications, procurements, risks and stakeholder engagement.

The status report sets forth information regarding the current reporting period. In addition, it might also include the work planned for the next reporting period, the status of change requests and the status of issues.

From a communications perspective, the project status report is arguably the most important project management document. Where there is effective status reporting, stakeholders receive early indications of problems with the project. Where there is early detection, preventative and corrective measures can be swiftly implemented.

For this reason, the project status report should be drafted to suit the informational needs of those receiving the report. These needs may vary stakeholder to stakeholders. Some prefer a short, simple format and others prefer the more detailed, in-depth information that the template below is designed to capture.

During the project planning phase, take time to discover the status reporting requirements and develop an agreed upon (approved) reporting format. The template below should make this job easy. It prompts a rather detailed project status report; however, it's completely editable.

Who Prepares the Project Status Report?

The project manager is the person responsible for preparing and distributing the project status report. It should be prepared and distributed frequently and at regular intervals.

What Are the Inputs?

Inputs to preparing the project status report include all the information gathered during the monitoring and controlling processes. Inputs might also include organizational process assets.

How Is It Used?

The project status report is prepared and distributed frequently and at regular intervals. It's used to inform the project sponsor and other stakeholders about the health of the project so that, if necessary, preventative or corrective measures can be swiftly implemented.

2.28 Short Project Status Report Template

What Is a Short Project Status Report?

Project status report is a document that provides information regarding the health of a project it. It speaks to matters like schedule, risk, budget, scope, quality, human resources, communications and procurements.

Compared to an in-depth report of the project health, a short project status report seeks to capture only the "news you can use." It highlights important project information and avoids in-depth analysis.

Status reports are most effective when they are published regularly and frequently. Their publication comprises one of the more important project communications. Project status reports are a part of the project communications plan; a subsidiary plan of the project management plan.

Who Creates the Short Project Status Report?

The project managers create and distributes the project status report.

What Are the Inputs?

Inputs to the project management status report include the documents generated during the monitoring and controlling process.

How Is It Used?

A project status report is used to keep people informed of the project health. It's best used when published to the sponsor, project team members and other stakeholders on a regular and frequent basis. Frequent and regular status reporting enables early detection of problems and provides for the swift implementation of corrective measures.

2.29 Assumption Log Template

What Is an Assumption Log?

Assumption is a factor that is true for planning purposes; however, it has not been proven or demonstrated. An assumption log is simply a place to log all assumptions and track the validation of each one.

We make project assumptions out of necessity. They allow us to continue forward with planning without checking the validity of every single fact. If we couldn't make assumptions, it would be difficult to make any progress with planning.

Capturing the assumption is only part of the work. Next, we must verify if the assumptions are true. If we assumed during planning that is correct, there is nothing further to do. If we assumed that is incorrect, it's likely that the project plans will need updated.

Left unverified, assumptions pose risk to the project; hence, the assumptions log is part of the risk management plan.

Who Creates the Assumption Log?

An assumption log is created by the project manager.

What Are the Inputs?

Typically, all initiation and planning documents are inputs to creating and maintaining an assumption log. Where risks are identified, assumptions are made. Where schedule is planned, assumptions are made.

How Is It Used?

Inaccurate, inconsistent and incomplete assumptions can create project risk. An assumption log is used to track all assumptions and explore their validity.

2.30 Issue Log Template

What Is an Issue Log?

An issue is a matter in question or dispute or one that is not settled. It can also be an obstacle or problem and there may or may not be opposing views or disagreements regarding it. An issue log is a place to log all issues and track the status of each one.

Most projects will encounter a few snags along the way. Left unattended, these snags expose the project to risk; hence, the issue log is a part of the risk management plan.

This issue log template captures the issue number, the date, the name of the person that reported the issue, the proposed resolution, the name of the person who approved the resolution, the name of the person the issue is assigned to, and the status of the issue.

Who Creates the Issue Log?

An issue log is created by the project manager.

What Are the Inputs?

Typically, the execution process and the monitoring and controlling processes create inputs for the issue log.

How Is It Used?

An issue log is used to track all issues. It captures the issue, the proposed resolution, the assignment and the status of the issue. Once logged, an issue can be shared with the project team and key stakeholders and assigned for resolution. Proactive issue management improves the likelihood of strong project performance.

2.31 Risk Breakdown Structure

What Is a Risk Breakdown Structure?

Risk breakdown structure (RBS), in form, is much like a work breakdown structure (WBS). Both are organized as hierarchical breakdowns, and each contain descending levels with increased detail. Both the WBS and the RBS seek to decompose items to actionable levels.

With the risk breakdown structure, risks are organized according to risk categories. The highest level of the RBS would include the project name. In a construction project, examples of next highest-level risks might include: project management, material supply and the weather.

When we further decompose the risk category of project management, we might list: inexperienced project manager and relatively young project management office. Beneath young project management office, we might find risks like: lacking in established procedures, little to no documented lessons learned.

The risk breakdown structure can be constructed in several formats. Sometimes they appear in the form of a flow chart and sometimes in the form of an outline or list. The free template below uses an outline or list-style presentation.

2.32 Risk Register Template

What Is a Risk Register?

A risk is something that, if it occurs, can present a threat or an opportunity to a project. That's right; risks can have either positive or negative effects.

Regardless of whether the effect is negative or positive, they potentially impact activities, schedule, cost and project resources. For this reason, risks are identified throughout the project and a plan is implemented to manage them. As you would guess, the risk register is a part of the risk management plan.

A risk register captures each identified risk associated with a project. Often it contains the risk description, the risk number, the risk owner, a mitigation strategy, a proposed response, summary information regarding risk analysis and the status of the risk.

Who Creates it?

The Risk Register is created by the project manager.

What Are the Inputs?

Risks can be identified before the project is authorized and at any time during the project life cycle. All those documents and process aimed at risk identification become inputs to the risk register. Among other things, inputs include expert knowledge, interviews, questionnaires, lessons learned, laws and regulations, enterprise environmental factors, organizational process assets, project planning documents and assumptions.

How Is It Used?

The Risk Register is used to capture all projects risks and monitor the status of each one from a high-level perspective. The Risk Register is a valuable input to performing qualitative and quantitative

risk analysis and for developing risk response plans. The risk register should be reviewed and continuously updated throughout the project life cycle.

2.33 Procurement Requirements

What Are Procurement Requirements?

Procurement requirements refer to the goods and services that must be acquired from organizations outside the performing organization. For a variety of reasons, sometimes performing organizations rely on vendors to provide what's needed to complete a project.

For example, consider the widget manufacturer that undertakes a project to automate their inventory tracking system. Some of the project work activities involve the relocation of storage bins in their main warehouse. Some of the work activities involve custom software development. As to the software development activities, widget manufacturer doesn't have a human resource who knows how to develop the software application. Regarding the software development activities, widget manufacturer must procure those services.

"Procure" isn't just another word for "purchase." You can be certain there's a difference. Purchasing refers to the act of ordering and receiving goods and services. Procuring refers to a whole host of activities. When we procure a good or service, we first establish the requirements. We perform market research, evaluate vendors, solicit bids, negotiate contracts, purchase what we need and integrate the delivery of those services or goods into the project.

Who Creates the Procurement Requirements List?

The project manager creates the procurement requirements list. Input is obtained from others on the project team, of course.

What Are the Inputs?

Inputs to developing the procurement requirements list include the WBS and its associated dictionary, the human resource requirements list, organizational process assets and enterprise environmental factors.

How Is It Used?

The procurement requirements list is used to capture and track the procurement requirements that become identified during project planning. The free template below captures the WBS ID, the activity name, requirements, dates needed and the procurement authority. Once complete, the list becomes an input to developing the procurement management plan.

2.34 Stakeholder Analysis Template

What Is Stakeholder Analysis?

Stakeholder Analysis is the act of gathering and analyzing information to determine whether a stakeholder's interests should be considered throughout the duration of the project. Through analysis, we consider several pieces of information like whether the person or organization is an internal or external stakeholder. Additionally, we exam the stakeholders level of influence and their ability to impact the project. Its primary purpose is to ascertain how each stakeholder might exert influence over the project. All stakeholders are not created equally; therefore, they won't all require the same treatment or

attention. By performing stakeholder analysis, we're better able to determine who requires what type of communication and we'll better understand the frequency with which it should be sent. We'll identify the stakeholders for whom we should perform engagement activities and we'll identify which stakeholders expose the project to risk.

By performing stakeholder analysis, we analyze the interests of everyone who is affected by the project. This allows us to classify the stakeholders so that we're better able to plan communications, engagement activities and risk responses.

Who Performs Stakeholder Analysis?

It's the project managers responsibility to manage the project stakeholders and plan the project; therefore, stakeholder analysis is performed by the project manager.

What Are the Inputs?

Inputs to performing stakeholder analysis include the stakeholder register, expert judgement, interviews, lessons learned and conversations with other stakeholders.

How Is It Used?

The Stakeholder Analysis template is used to classify stakeholders and assess their interests in the project. It's used to document their expectations of the project, their levels of influence and their communication needs. It's an input to planning project communications, risk and engagement activities. It's also an input to developing the Stakeholder Management Plan.

2.35 Stakeholder Management Plan Template

What Is a Stakeholder Management Plan?

Stakeholder management plan is a subsidiary plan of the project management plan. Its purpose is to define the requirements, processes, and techniques for engaging stakeholders based on an analysis of their needs, interests, and abilities to impact the project.

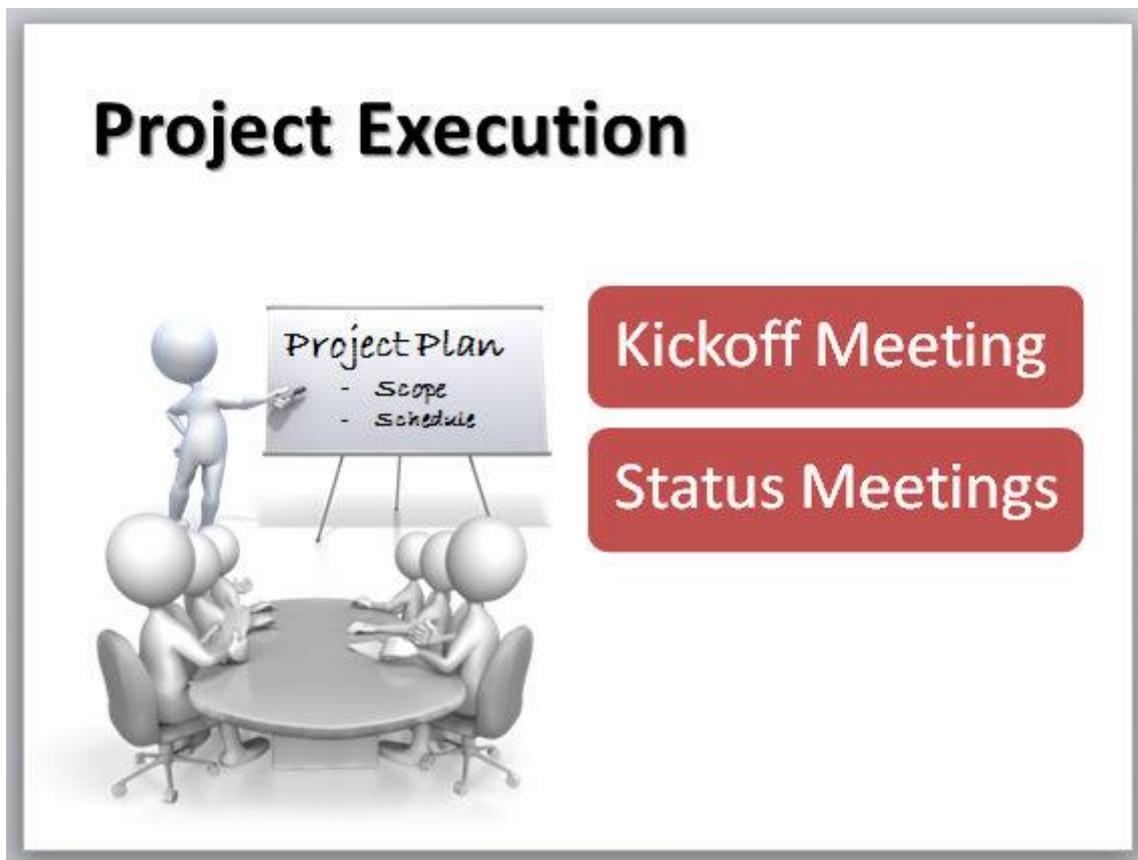
The stakeholder management plan includes strategies for managing both positive and negative project stakeholders. It contains a stakeholder register which lists all stakeholders along with their contact information. In addition, it contains a stakeholder analysis document that seeks to uncover important information regarding stakeholder needs.

Because no two stakeholders are alike, the attention each one receives may vary. The stakeholder management plan is used for determining the types and amounts of communications each stakeholder should receive. The analysis section is also good for spotting risks that should be addressed in the risk management plan.

3.0 Executing Process Group

This phase involves the execution of each activity and task listed in the Project Plan. While the activities and tasks are being executed, a series of management processes are undertaken to monitor and control the deliverables being output by the project.

This includes the identification of changes, risks and issues, the review of deliverable quality and the measurement of each deliverable being produced against the acceptance criteria. Once all the deliverables have been produced and the customer has accepted the final solution, the project is ready for closure.



3.1 Timesheet Template

What Is a Timesheet Template?

A timesheet template is a form used for tracking the amount of time individuals work. In this case, the individuals we're referring to are members of the project team.

Throughout the project life cycle, project managers track numerous pieces of information. On occasion, that includes capturing the amount of time worked. This is especially true where the cost of labor is deducted from the project budget.

If you find yourself needing to track time worked, and there isn't a system already in place, consider using the timesheet template below. It captures the number of regular hours worked and the amount of overtime worked. In addition, it tracks sick time and vacation time.

Who Creates the Timesheet Template?

Timesheets are maintained by each person who is responsible for reporting their time. In some organizations, workers enter the data manually. In others, it's entered online.

What Are the Inputs?

The inputs to a timesheet included entering information about the work performed. For the template below, the user enters the dates service is performed, the start times and the stop times.

How Is It used?

The timesheet is used to track the total amount of time that a person performs project work. If task descriptions are included on the timesheet, it becomes a more useful tool. In that case, it can also be used to provide historical data. For example, we can look back to see how long it took to accomplish a specific task or how long it took to complete a certain project phase. Besides providing useful information for monitoring the health of the project, the data can be used for future schedule and cost estimating activities.

3.2 Expense Report Template

What Is an Expense Report Template?

A project expense report is a log of expenditures that are incurred while performing project work. A person tracks expenses when they are reimbursable.

Expense reports can be produced weekly, bi-monthly or monthly, depending on accounting preferences. In addition to tracking which costs must be reimbursed; the report provides employers with a way to track tax deductible business expenses.

What Does It Track?

The expense report below is a simple one that's easy to use. It tracks both travel and non-travel expenses.

Who Creates the Expense Report?

Expense reports are created by those who incur reimbursable expenses on behalf of the project. An example includes a project manager who travels to another city to meet with a client. During the travel, he or she may pay for airfare or hotel costs with their personal funds.

What Are the Inputs?

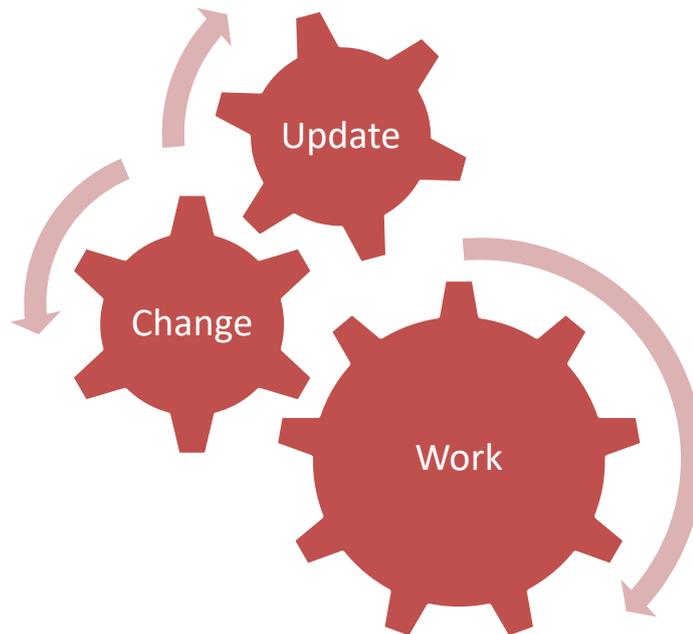
Inputs to a project expense report include the date an expense is incurred, a description of the expenses and the actual cost.

How Is It Used?

Typically, when a project team member incurs an approved cost that is attributable to the project, he or she saves the receipt and logs the item on the expense report. At set intervals, and depending on accounting preferences, the receipts and the expense report is submitted for approval and reimbursement.

4.0 Monitoring and Controlling Process Group

The monitoring and controlling processes are required to track, review, and regulate the progress and performance of the project. In this phase, project managers identify any areas in which changes to the plan are required and initiate those corresponding changes.



4.1 Change Request Template

What Is a Change Request Template?

Change request is a request to increase, decrease or modify any document, deliverable, or baseline. It is a formal, written request that occurs after the parameters of the project have been agreed to or baselined and after the project is underway.

The ability to control change is paramount to project success. Without a change control process, the project manager's ability to control scope, schedule, cost and quality is greatly diminished.

The change request form is arguably the most important document in the change control process. It provides a single avenue for requesting a change. Once the change is requested, it becomes sized and either approved, deferred, or disapproved. If approved, the projects plans must reflect the change and the change must be implemented.

This change request template captures a description of the change, the reason for it, sections for impact analysis and a place to record the decision regarding the request. Lastly, this template captures the signature of the person who approved the changed.

Who Creates the Change Request?

A change request can be created by the project manager, the client, the sponsor or another project stakeholder.

What Are the Inputs?

Inputs to a change request include all the monitoring and controlling processes and many of the executing processes. All project planning documents that concern the subject of the change request may become an input.

How Is It Used?

The change request is used to formally request the change. It can include a request for corrective action, preventative action and defect repair. Once complete, it becomes submitted to the change control board for approval or rejection. Like all other work activities, approved change requests become planned, executed, monitored and controlled and closed.

4.2 Change Request Log Template

What Is a Change Request Log?

Change request log is a document that's used to record all change requests that are received during the life of a project. As each change request is received, it becomes logged before it is sized and sent for approval, deferment, or rejection.

Besides providing a place to track every change request received, the change request log is useful for tracing the request from approval or rejection through implementation and acceptance. The template below also captures the name of the requestor and, if approved, the implementation due date.

By monitoring the status of every change request received, the project manager is better able to control the project scope, budget, schedule, and quality requirements. At a single glance, he or she can see the status of each request.

Timely disposition of every change request is important for the health of a project. The change request log is an important tool for meeting these objectives.

4.3 Issue Log Template

What Is an Issue Log?

Issue is a matter in question or dispute or one that is not settled. It can also be an obstacle or problem and there may or may not be opposing views or disagreements regarding it. An issue log is a place to log all issues and track the status of each one.

Most projects will encounter a few snags along the way. Left unattended, these snags expose the project to risk; hence, the issue log is a part of the risk management plan.

This issue log template captures the issue number, the date, the name of the person that reported the issue, the proposed resolution, the name of the person who approved the resolution, the name of the person the issue is assigned to, and the status of the issue.

Who Creates the Issue Log?

An issue log is created by the project manager.

What Are the Inputs?

Typically, the execution process and the monitoring and controlling processes create inputs for the issue log.

How Is It Used?

An issue log is used to track all issues. It captures the issue, the proposed resolution, the assignment and the status of the issue. Once logged, an issue can be shared with the project team and key stakeholders and assigned for resolution. Proactive issue management improves the likelihood of strong project performance.

4.4 Project Status Report Template

What Is a Project Status Report Template?

Project status report template helps project managers prepare clear and concise reports of project status and performance information. Because it's a template, it prompts reporting in a consistent manner.

A project status report provides the reader with insight regarding the health of a project. Typically, it provides an analysis of past performance and an analysis of project forecasts. It does this by reporting work performance information that's gathered during the monitoring and controlling processes. That data comes from validating and controlling scope and controlling: schedule, costs, quality, communications, procurements, risks and stakeholder engagement.

The status report sets forth information regarding the current reporting period. In addition, it might also include the work planned for the next reporting period, the status of change requests and the status of issues.

From a communications perspective, the project status report is arguably the most important project management document. Where there is effective status reporting, stakeholders receive early indications of problems with the project. Where there is early detection, preventative and corrective measures can be swiftly implemented.

For this reason, the project status report should be drafted to suit the informational needs of those receiving the report. These needs may vary stakeholder to stakeholders. Some prefer a short, simple format and others prefer the more detailed, in-depth information that the template below is designed to capture.

During the project planning phase, take time to discover the status reporting requirements and develop an agreed upon (approved) reporting format. The template below should make this job easy. It prompts a rather detailed project status report; however, it's completely editable. Simply modify it to fit the reporting needs of your project.

Who Prepares the Project Status Report?

The project manager is the person responsible for preparing and distributing the project status report. It should be prepared and distributed frequently and at regular intervals.

What Are the Inputs?

Inputs to preparing the project status report include all the information gathered during the monitoring and controlling processes. Inputs might also include organizational process assets.

How Is It Used?

The project status report is prepared and distributed frequently and at regular intervals. It's used to inform the project sponsor and other stakeholders about the health of the project so that, if necessary, preventative or corrective measures can be swiftly implemented.

5.0 Closing Process Group

The closing processes are performed to finalize all activities across all process groups and formally close the project or phase.



5.1 Lessons Learned Log Template

What Is a Lessons Learned Log?

A lesson learned is something that's learned from a project. It can be identified during any process and can be negative or positive. Lessons learned are typically captured in a lesson learned database, so they can be searched and reviewed later. They play an important role in continuous process improvement.

Consider documenting the lessons learned for every project you manage. A lesson learned log, like the one below, is a good place to capture them.

Who Creates It?

The lessons learned log is created by the project manager. He or she owns the document even though anyone else on the project team could identify a lesson learned.

What Are the Inputs?

Lessons learned can be captured anytime during or after the project; however, most inputs to a lesson learned log are identified during the executing, and monitoring and controlling processes. Examples of inputs might include a successful estimating technique or a failed process in quality control.

How Is the Lessons Learned Log Used?

The lessons learned log is used to capture lessons from a project. Throughout the project life cycle, it can be reviewed by the project manager and the project team. After the project closes, the lessons learned log is stored so that the lessons can be accessed when planning future projects. By capturing and reviewing lessons learned, an organization is best situated to implement a system of continuous process improvement.

5.2 Phase Acceptance Template

What Is Phase Acceptance?

Project phase is a grouping of related project activities that, when complete, make up a deliverable or deliverables. For example, in a construction project, the following might be categorized as project phases: footer, framing, plumbing, electricity and so on.

Phase acceptance is a formal procedure whereby the phase deliverables are reviewed and validated as having met the previously agreed upon acceptance criteria. Where all deliverables meet the acceptance criteria, the phase is accepted.

Acknowledgement of phase acceptance is often formal. Typically, it's accompanied by the execution of a phase acceptance document.

Who Prepares the Phase Acceptance Form?

The project manager completes the phase acceptance document and presents it and the deliverables to the person responsible for validating if the acceptance criteria are met.

What Are the Inputs?

Inputs to generating the phase acceptance document include the WBS and the WBS dictionary. Inputs might also include a deliverables list, organizational process assets and enterprise environmental factors.

How Is It Used?

When the deliverables are complete, they're presented for validation. In other words, they're reviewed to determine whether they meet the formal acceptance criteria. When all deliverables have been validated, the phase acceptance document is signed by the person who validated the deliverables. Once a phase is formally accepted, the project manager can finalize all activities across the project management process groups to formally close that phase.

5.3 Project Acceptance Form

What Is a Project Acceptance Form?

Project acceptance form is a document that, when executed, signifies formal, written acceptance of the entire project. It acknowledges that all project requirements have been met and that all deliverables are complete.

Where there are formal acceptance procedures, note that each phase becomes acceptance before the final project acceptance document is signed. By the time each phase is accepted, project acceptance is typically little more than a formality.

Project acceptance does trigger events; however. An executed project acceptance document provides the project manager with authority to formally close the project.

Who Prepares the Project Acceptance Form?

The project manager prepares the project acceptance document and presents it to the person responsible for validating whether all phases have been accepted and whether the project acceptance criteria are met.

What Are the Inputs?

Inputs to preparing a project acceptance form include the phase acceptance documents for each project phase. Inputs might also include a deliverables list, organizational process assets and enterprise environmental factors.

How Is It Used?

Typically, the project acceptance form is presented to an authorized representative of the buying organization after all project activities are complete, after all testing is finished, after training is administered, if any, and after the project is handed over to operations.

Once the project is formally accepted, the project manager can finalize all activities across the project management process groups to formally close that project.

5.4 Release Human Resources Template

What Is a Release Human Resources Template?

Release human resources template is a project management template. It's used to formally release human resources from a project. Most often, it's used when a phase or a project is closing. Note that the release human resources template isn't used on all projects. It's only used when the human resources for the project come from within the performing organization. More specifically, it's used when those resources are shared.

An example of its use includes a project in the accounting department that requires the services of software development professional from the IT department. Once the software development part of the project is complete, the project manager formally released the developer from the project.

Who Prepares the Release Human Resources Template?

The release human resources template is filled out and executed by the project manager. Thereafter, he or she presents it to the supervisor of the person who is being released from project work.

What Are the Inputs?

Inputs to completing the template might include information found within the human resources management plan. Additionally, inputs may include organizational process assets.

How Is It Used?

The release human resources template is used to release a person from project work. The project manager completes and signs the template then delivers it to the supervisor of the person being released. Notice of the release allows the supervisor to once again begin scheduling the resource for his or her normal work activities.

Glossary:

The following definitions apply to terminology used within the Project Lifecycle:

- **Acceptance Management**

The process by which deliverables produced by the project are reviewed and accepted by the customer as meeting their specific requirements

- **Acceptance Planning**

The process of identifying the milestones, criteria and standards for the acceptance of project deliverables by the customer

- **Business Case**

A document outlining the justification for the initiation of a project. It includes a description of the business problem (or opportunity), a list of the available solution options, their associated costs and benefits and a preferred option for approval

- **Change Management**

The process by which changes to the project scope, deliverables, timescales or resources are formally defined, evaluated and approved prior to implementation

- **Communications Management**

The process by which formal communications messages are identified, created, reviewed and communicated within a project

- **Communications Planning**

The process of identifying the type and regularity of information to be provided to all project stakeholders to keep them informed of the progress of the project

- **Management**

The process by which costs (or expenses) incurred on the project are formally identified, approved and paid

- **Deliverable**

A quantifiable outcome of the project which results in the partial (or full) achievement of the project objectives

- **Dependency**

A logical relationship between two or more project activities. The four types of dependencies include: start-to-finish, start-to-start, finish-to-start, finish-to-finish

- **Feasibility Study**

A document which identifies each of the solution options to a business problem (or opportunity) and assesses the likelihood of each option's achieving the desired result

- **Financial Planning**

The process of identifying the financial resources required to undertake the project. This includes a list of the types of costs to be incurred on the project (e.g. labor, equipment, materials and administration costs) and a schedule outlining when the respective costs are likely to be incurred

- **Issue**

Events which are currently affecting the ability of the project to produce the required deliverables

- **Issue Management**

The process by which issues are formally identified, communicated, monitored and resolved

- **Job Description**

A document which describes a role and its responsibilities within a project

- **Milestone**

The recognition of an important event within the project, usually the achievement of a key project deliverable

- **Procurement Management**

The process by which product is sourced from a preferred supplier, including the on-going management of the supplier relationship

- **Procurement Planning**

The process of identifying the products to be sourced externally and the methods for acquiring them

- **Product**

A good or service which is acquired from an external supplier to assist with the production of a project deliverable

- **Project**

A unique endeavor to produce a set of deliverables within clearly specified time, cost and quality constraints

- **Project Activity**

A set of project tasks which usually results in the partial (or full) completion of a project deliverable.

- **Project Lifecycle**

A series of project phases which are undertaken in either sequential or parallel order

- **Project Management**

The skills, tools and management processes required to successfully undertake a project

- **Project Office**

The physical premises within which Project Administration staff (e.g. the Project Manager and support staff) reside

- **Project Phase**

A set of project activities and tasks which usually result in the completion of a project deliverable

- **Project Plan**

A document which lists the phases, activities, tasks, timeframes and resources required to complete the project

- **Project Schedule**

A series of planned dates within which activities and tasks must be completed to achieve project milestones

- **Project Task**

A specific work item to be undertaken which usually results in the partial completion of a project deliverable

- **Project Team**

A collation of people who report to the Project Manager

- **Quality**

The level of conformance of the final deliverable(s) to the customer's requirements.

- **Quality Assurance**

The preventative steps taken to eliminate any variances in the quality of the deliverable produced from the quality targets set

- **Quality Control**

The curative steps taken to eliminate any variances in the quality of the deliverable produced from the quality targets set.

- **Quality Management**

The process by which the quality of the deliverables and management processes is assured and controlled for the project, using Quality Assurance and Quality Control techniques

- **Quality Planning**

The process of identifying the approach taken to ensure the quality of the deliverables produced by the project and of the management processes undertaken. This includes a list of the quality criteria and standards to be achieved as well as the Quality Assurance and Quality Control techniques to be undertaken

- **Request for Information**

A document which is issued by a project to a wide group of potential suppliers to enable those suppliers to provide summarized information outlining how they will meet the procurement requirements of the project

- **Request for Proposal**

A document which is issued by a project to a short-listed group of suppliers to enable the suppliers to submit a detailed proposal outlining how they will meet the procurement requirements of the project

- **Resource**

The labor, equipment and materials used to complete the activities in the Project

- **Resource Planning**

The process of identifying the resources required to complete the project. This includes a list of the types of resources required and a schedule providing the use of and activities undertaken by each resource

- **Risk**

Any event which is likely to adversely affect the ability of the project to achieve the defined objectives

- **Risk Management**

The process by which risks to the project (e.g. to the scope, deliverables, timescales or resources) are formally identified, quantified and managed during the project. The process entails completing several actions to reduce the likelihood of occurrence and the severity of impact of each risk

- **Risk Mitigation**

A set of actions to be taken to avoid, transfer or mitigate a risk, based on its priority. This includes the preventative actions to be taken during the project to reduce the likelihood of the risk's occurring as well as the contingent actions to be taken to reduce the impact on the project should the risk eventuate.

- **Risk Planning**

The formulation of a document which outlines the foreseeable project risks and provides a set of actions to be taken to both prevent the risk from occurring and reduce the impact of the risk should it eventuate

- **Scope**

The total aggregation of deliverables to be produced by the project

- **Solution**

A set of deliverables which, once combined, solve a business problem (or realize a business opportunity)

- **Stage-Gate**

A checkpoint at the end of each project phase to ensure that the project has achieved its stated objectives and deliverables as planned

- **Statement of Work**

A document which defines the procurement requirements of the project in sufficient detail to enable potential suppliers to determine if they can meet those requirements

- **Supplier Contract**

An agreement between the Project Team and an external supplier for the acquisition of a defined set of products to meet the procurement requirements of the Project

- **Tender Document**

A formal document included during the tender process which outlines the information required to provide the Project Team with the confidence that a supplier can meet the procurement needs of the project. The RFI and RFP are both examples of Tender Documents

- **Tender Management**

The process by which interested suppliers are identified, evaluated and selected for the supply of products (goods or services) to the project. This process entails formalizing the procurement requirements and tender documentation, receiving tender responses and selecting a preferred supplier

- **Project Charter**

A document which outlines the purpose of the project, the way the project will be structured and how it will be successfully implemented

- **Time Management**

The process within which time spent by staff undertaking project tasks is recorded against the project.