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Blank Project Management Templates

Saving Time!
Saving Money!
Saving Stress!

Catch Ron Rosenhead's Blog at www.ronrosenhead.co.uk

Note: in supplying these templates, Project Agency cannot be held responsible for how they are completed!

Listed below are some forms you will find on the next pages.

Please complete the forms as appropriate. **Please note**, completing the forms is an aid to help you deliver your projects, not an end in itself.

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These project management templates have been produced for open distribution to anyone. Please feel free to pass them onto friends or colleagues. The forms have been used by professional staff at all levels – staff who have to deliver projects. Some of these projects are small quick delivery (less than a month), others large long term projects which cost significant sums of money.

We would be delighted to hear how you used these forms and how useful they were in supporting the delivery of your project. Please email events@projectagency.com. Do look at www.projectagency.co.uk where you can find a range of information, products and services.

Finally, good luck with all of your projects and we would be delighted to talk with you about any project management issues you may have. Call on +44 (0)20 846 7766 or email events@projectagency.com

Defining Project Responsibilities

TASKS/ACTIVITIES	PERSONNEL							

Stakeholder Analysis

The purpose of stakeholder analysis is to inform the project manager and sponsor who should contribute to the project, where barriers might be, and the actions that need to be taken prior to detailed project planning.

Stakeholder	Their interest or requirement from the project	What the project needs from them	Perceived attitudes and/or risks	Actions to take

Milestone Chart

Main milestones/phases shown on higher chart, and sub-milestones for each phase on charts below

MILESTONES	TIME [in suitable units -days, weeks, months, etc.]												
	Responsibility												

Milestone Report

Project:

Date of Milestone meeting/discussion:

Deliverables due	Due date	R/A/G*	Action to take to bring deliverable or task back on schedule

* **R** = Red flags [off plan - describe in detail: quality, cost, time]

A = Amber [is almost off schedule or will definitely be off schedule NOTE: you may need to agree the precise definition before use]

G = Green flags [to plan or better - show savings]

Variation Form

Activity name /No.	Description	Date to be delivered	Revised est. Q/C/T	Reason for delay. Q/C/T? Explain	Effect on project

Signed:

Project Sponsor

Project Manager

Date

Risk Analysis

Score as follows, for Likelihood and Impact: High = 3, Medium = 2, Low = 1

Nature of Risk or Uncertainty	Likelihood High/Medium/Low	Impact High/Medium/Low	Likelihood x Impact [Score]	Actions required and who will take responsibility to manage the risk

Business Case Form

Please complete the form below and submit it to your project sponsor.

Background to the project (PLEASE KEEP BRIEF)
General aims(s)
Initial Risks
Expected Outcomes
Benefits of running with this project
Initial estimates of cost and time £: Time:
Outcome of the business case
Decision from (x x)
Date

Project Definition Form [or PID]	
Project Title:	Put here a very brief title
Sponsor:	Insert actual sponsor name
State below the link with the corporate agenda – the actual wording please.	
Put here the actual words in the corporate agenda – showing the link with this project	
Project Background:	The background to the project. Enough information to inform the reader.
Project Benefits:	An outline of what the benefits are to the organisation, individuals or stakeholders in delivering the project
Project Objectives:	The specific objectives for the project. NOTE: the objectives can be one line or more detailed text.
Project Deliverables:	What you will be delivering at the end of the project. NOTE: these are the what you will have at the end of the project, e.g. a report, a building, improved service levels etc.
This project will include:	This project will not include:
This section defines the boundaries of the project.	Planning details should <u>not</u> be included at this stage.
Success Criteria:	How you will measure the success of the project. NOTE: the success criteria must be measurable.
Constraints:	Examples here can be specific (a skill which the project team must have) resources, or a legal deadline – NOTE: only include time and money if you can quantify them.
Key Assumptions:	The assumptions you are making in putting this document together.
Project Manager:	Who fulfils this role and <u>what they do.</u>
Project Sponsor:	Who fulfils this role and <u>what they do.</u>

Project Board/Steering Group Members:	Who fulfils these roles and what they do. NOTE: may not be appropriate for <u>all</u> projects	Project Team Members:	
Budget ❶			
Resource Costs:		Other Costs:	
Total costs (attach a breakdown of the overall budget)			
<ul style="list-style-type: none"> VAT*– Some projects may have important VAT issues. Have you spoken to accountancy to discuss these? 			
Start Date:		Completion Date:	
Signature of Project Manager:		Date:	
Approval from Sponsor:		Date:	

- ❶ For your organisation, you will need to liaise with your Finance people in order to develop financial information that will inform project delivery. The data on this form in relation to finance needs to be fine tuned to your organisational and project management needs

Project Reporting Form

Project Title:	Number:
Project Sponsor:	Project Manager:

Progress Report	Report No.
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RAG Status*:	RED / AMBER / GREEN
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Headlines

Tasks, Milestones, Outcomes delivered this period		Completion dates	
Tasks, Milestones, Outcomes	Comments	Plan	Actual

Major Risks and Issues Include an assessment of the impact and any actions taken

Recommendations and Requests for Decisions or Support

Tasks, Milestones, Outcomes scheduled for next period		Completion dates	
Tasks, Milestones, Outcomes	Comments	Plan	Forecast

* RED	<i>"Major concern - escalate to the next level"</i> Slippage greater than 10% of remaining time or budget, or quality severely compromised. Corrective Action not in place, or not effective. Unlikely to deliver on time to budget or quality requirements
AMBER	<i>"Minor concern – being actively managed"</i> Slippage less than 10% of remaining time or budget, or quality impact is minor. Remedial plan in place.
GREEN	<i>"Normal level of attention"</i> No material slippage. No additional attention needed

Highlight/Progress Report

Project Name: PROJECT NAME

Reporting Period:		Project Manager:		Project Sponsor:										
Prepared by:		Date Prepared:		RAG Status	R	Project Phase:	0							
Project Description:				Project End Date:		dd/mm/yyyy								
Key Deliverables Completed this period			Key Deliverables Outstanding this period			Key Deliverables for next reporting period								
						Delivery Date	Delivery Date							
Risk Management			Issue Management			Change Management								
Log No	Risk	Action/Status	Log No	Issue	Action/Status	Req No	Details	Approved						
Financial Statement														
Capital					Revenue					External				
Source	Budget	Actual	Remaining	Forecast	Source	Budget	Actual	Remaining	Forecast	Source	Budget	Actual	Remaining	Forecast
			0					0					0	

Change Control Sheet

Project Title	Project Number
Project Manager	

CHANGE REQUEST		
Originator Phone:	Date of request	Change request no. <i>allocated by Change Controller</i>
Items to be changed		Reference(s)
Description of change (reasons for change, benefits, date required)		
Estimated cost, and time to implement (quotation attached? Yes No)		
Priority / Constraints (impact on other deliverables, implications of not proceeding, risks)		

CHANGE EVALUATION		
What is affected	Work required (resources, costs, dates)	
Related change requests		
Name of evaluator	Date evaluated	Signature

CHANGE APPROVAL			
Accepted	Rejected	Deferred	
Name	Signed	Date	
Comments			

CHANGE IMPLEMENTATION			
Asset	Implementer	Date completed	Signature

Change Control Log

Project Title	Project Number
Project Manager	

Change number	Description of change	Date received	Date evaluated	Date approved	Date completed

Actual V Planned

Activity	Planned Time	Actual Time	Difference	Planned Cost	Actual Cost	Difference

Learning Log

Lesson number	What did you do well in delivering the activity, stage or project?	What did you not do so well in delivering the activity, stage or project?	What can you learn for the next time and how will you share this with your colleagues?

Project Management - Check Sheet

Amend this Check Sheet to suit your project

A: SET UP - INITIATION	Y	N	COMMENTS		Y	N	COMMENTS
1 Developed the business case? 2 Is a full options appraisal necessary? 3 Is the project in line with the strategic plan? 4 Has the project received sign off by sponsor or project board?				5 Have you identified the critical path for the project? 6 Have you developed a communications plan and included its component parts into the Gantt charts? 7 Are you continuing to carry out risk analysis throughout the project? 8 Are quality standards high? How do you know?			
B: SET UP - DEFINITION 1 Has a PID or project definition form been completed? 2 Are roles explicit and documented? 3 Are levels of authority clear? 4 Have you carried out a stakeholder analysis and planned accordingly? 5 Have you assessed risks and put a plan into action to monitor them? 6 Are you clear what is driving the project Quality, Cost or Time (1 only) 7 Have clear project review procedures been established? 8 Has planning started for a start up workshop (or series of workshops)? 9 Team selection - have you got the correct mix of skills and professional experience?				D: DELIVERY 1 Have you identified the appropriate type of control – loose versus tight? 2 Project reporting – are you clear who reports what and to whom and how? 3 Do you have a clear procedure for managing change? 4 Have you developed a planned versus actual schedule? How up to date is it? 5 Tolerance – have you an agreed tolerance figure? 6 Variations – are these quickly flagged?			
C: DELIVERY PLANNING 1 Have you broken the project down into its component parts – work breakdown 2 How accurate are your estimates? If a low percentage then recalculate. 3 Have you developed a milestone chart or produced a Gantt chart? 4 Have you developed an overall project budget? Have you sought advice from financial experts				E: CLOSEDOWN AND REVIEW 1 Post project review has been planned? 2 Learning identified? 3 Is the project still delivering the benefits intended? 4 Is there a case for abandoning the project – off schedule or delivered a significant part of it? 5 End of project review reports are produced and circulated?			



Services provided by Project Agency

Project Agency provides a wide range of services. Some of these are listed below:

- ❑ Delivering practical project management training:
 - designed to ensure project managers and project team members understand the processes and skills to deliver effectively
 - customised to meet specific needs – really targeting organisational needs
 - working with project teams focusing on delivering a specific project – alongside developing their team skills
 - running PRINCE2 qualification programmes or PRINCE2 training workshops
- ❑ Developing in-house project management systems i.e. a customised project management system ensuring consistency of approach - complete with templates
- ❑ Running briefing sessions for project sponsors so they can understand their important role in projects
- ❑ Carrying out audits of projects – after project completion, end of stage or an audit of internal project management approaches.
- ❑ Organising and running start up workshops for groups pre project – ensuring projects get off to a really effective start
- ❑ Developing effective business cases.
- ❑ Effective project leadership.
- ❑ Working with senior managers identifying the key projects for the organisation and their priority
- ❑ Individual coaching support to project managers and project sponsors
- ❑ Developing programme management strategies and establishing project [programme] support offices

Please do visit our web site www.projectagency.com for further company information or call 020 8446 7766 for further information.

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