**Project Management**

**Word Templates**

By Laura Dallas Burford, PMP

A Supplement to the Book

***Project Management for Flat Organizations*:**

*Cost Effective Steps to Achieving Successful Results*

**Project Management**

**Word Templates**

The word templates included in this document were discussed in the book, *Project Management for Flat Organizations*. They are intended to be used as a starting point for a particular project or when developing a project management methodology for your organization.

Do not use a template just because it was provided in this document. If the template is not needed, do not use it—***only*** ***use those*** ***templates that meet your needs***.

For some projects, the scope statement and status report templates (in addition to a project plan—the scope, time, and cost created in Excel) may be the only documents required. Other projects might need or need to refer to all of the templates included in this document. Be flexible and modify them accordingly.

Project Management Methodology Table (From Chapter 2)

Project Tracking List (From Chapter 4)

Stakeholder List (From Chapter 5)

Requirements Document (From Chapter 6)

Scope Statement (From Chapter 7)

Estimating Template (From Chapter10)

Risk Register (From Chapter 14)

Communication Schedule (From Chapter 17)

Issue Log (From Chapter 20)

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Status Report (From Chapter 22)

Lessons Learned (From Chapter 23)

For Information On

*Project Management for Flat Organizations:*

*Cost Effective Steps to Achieving Successful Results*

Visit J. Ross Publishing at <http://www.jrosspub.com>

**Project Management Methodology Table**

|  |  |
| --- | --- |
| Organization: |  |
| Time Period: |  |
| Date Created: |  |

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| --- | --- | --- |
| Document | Purpose | Required or Optional \* |
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\*There can be one column noting required or optional or the column can be divided into categories such as under 3 Month s in Duration and Over 3Months in Duration or Technical and Non-Technical.

“The Project Process Flow.” Chap. 2 in *Project Management for Flat Organizations* ( J. Ross Publishing, 2012)*.*

**Project Tracking List**

Page \_\_\_ of \_\_\_

|  |  |
| --- | --- |
| Organization: |  |
| Time Period: |  |
| Date Created: |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Project | Description and Justification | Deliverable | Estimated Budget | Estimated Schedule | Project Sponsor | Project Manager | Actual Schedule |
| Start | End | Start | End \* |
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\* Enter anticipated completion date (add an A after the date) when the project begins and change to actual completion date when the project is completed.

“Authorize the Project.” Chap. 4 in *Project Management for Flat Organizations*, (J. Ross Publishing, 2012).

**Stakeholder List**

|  |  |
| --- | --- |
| Project Name: |  |
| Project Description: |  |
| Date Created: |  |

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| --- | --- | --- | --- | --- | --- | --- |
| Name | Category | Organizational Position | Project Role | Preferred CommunicationMethod | Power and Interest Classification | Expectations |
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“Identify the Stakeholders.” Chap. 5 in *Project Management for Flat Organizations*, (J. Ross Publishing, 2012).

**Requirements Document**

|  |  |
| --- | --- |
| Project Name: |  |
| Project Description: |  |
| Prepared By: |  |
| Date: |  |

**Categories**

Needs

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Wants

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Nice to Have

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“Determine the Requirements.” Chap. 6 in *Project Management for Flat Organizations*, (J. Ross Publishing, 2012).

**Scope Statement**

|  |  |
| --- | --- |
| Project Name: |  |
| Prepared By: |  |
| Date: |  |

Project Description

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Objectives

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Requirements

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Exclusions

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Acceptance Criteria

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Constraints, Assumptions, and Risks

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| Constraints | Assumptions | Risks |
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Key Deliverables and Milestones

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| --- | --- |
| Key Deliverables and Milestones | Dates |
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Cost

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| --- |
| Estimated Cost: |

Other Comments

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Signatures

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| --- | --- |
| Project Sponsor : | Date: |
| Project Manager: | Date: |
| Project Stakeholder: | Date: |

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“Define the Project Scope.” Chap. 7 in *Project Management for Flat Organizations*, (J. Ross Publishing, 2012). .

**Estimating Template**

|  |
| --- |
| Project Name: |
| Prepared By: |
| Date: |

|  |
| --- |
| Work Package (or Task) Number/Name |
| Description |

|  |
| --- |
| Time—Duration  |
| Time—Level of Effort |

Resources

**Staff**

|  |  |  |
| --- | --- | --- |
| Skills: | Person: |  Amount of Time: |
| Skills: | Person: |  Amount of Time:  |
|  Staff Constraints, Assumptions, and Risks |

**Other Resources:**

|  |  |
| --- | --- |
|  Consultants (include skills): | Total Time/Cost: |
|  Facilities: | Total Time/Cost: |
|  Equipment: | Total Time/Cost: |
|  Materials and Supplies: | Total Time/Cost: |
|  Software: | Total Time/Cost: |
|  Other: | Total Time/Cost: |
|  Other: | Total Time/Cost: |
|  Other Resources Constraints, Assumptions, and Risks |  |

“Determine the Work.” Chap. 10 in *Project Management for Flat Organizations*, (J. Ross Publishing, 2012).

**Risk Register**

Page \_\_\_ of \_\_\_

|  |  |
| --- | --- |
| Project Name: |  |
| Prepared By: |  |
| Date: |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Number | Category | Description | Impact  | Probability | Priority | Response | Owner |
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“Determine the Project Risks.” Chap. 14 in *Project Management for Flat Organizations*, (J. Ross Publishing, 2012).

**Communication Schedule**

Page \_\_\_ of \_\_\_

|  |  |
| --- | --- |
| Project Name: |  |
| Project Description: |  |
| Date: |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Delivery Method(What) | Purpose(Why) | Communication Method(How) | Frequency(When) | Stakeholder (Who) |
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“Communicate the Right Information.” Chap. 17 in *Project Management for Flat Organizations*, (J. Ross Publishing, 2012).

**Issue Log**

Page \_\_\_ of \_\_\_

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| --- | --- |
| Project Name: |  |
| Project Description: |  |
| Date: |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| No. | Issue | Significance/Impact  | Date Raised | Actions and Resolution | Assigned To | Date to be Resolved | Date Resolved |
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“Manage Issues and Change.” Chap. 20 in *Project Management for Flat Organizations*, (J. Ross Publishing, 2012).

**Change Control Log**

Page \_\_\_ of \_\_\_

|  |  |
| --- | --- |
| Project Name: |  |
| Project Description: |  |
| Date: |  |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| No. | Change Request | Reason Why | Date Requested | Requested By | Impact on Scope, Schedule,and Budget | Date Resolved | Decision | Comments |
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“Manage Issues and Change.” Chap. 20 in *Project Management for Flat Organizations*, (J. Ross Publishing, 2012).

**Status Report**

|  |  |
| --- | --- |
| Project Name: |  |
| Project Description: |  |
| Prepared By: |  |
| Week Ending: |  |

Project Status:

|  |
| --- |
| Overall Status |
| Work  |
| Schedule |
| Budget |

Key Deliverables and Milestones:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Key Deliverables and Milestones  | Planned End | ActualEnd | Forecasted | Comments |
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Issues:

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| --- | --- |
| Description | Action |
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Summary and Forecast:

Accomplishments This Week

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Plans for Next Week

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Late Tasks

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“Report the Status.” Chap. 22 in *Project Management for Flat Organizations*, (J. Ross Publishing, 2012).

**Lessons Learned**

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| --- |
| Project Name: |
| Project Description:  |
| Prepared By: |
| Date: |

What worked

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What did not work

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Ways to improve

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“The Closeout.” Chap. 23 in *Project Management for Flat Organizations*, (J. Ross Publishing, 2012).