CYNTHIA SNYDER DIONISIO

A PROJECT MANAGER'S BOOK OF TEMPLATES

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Acknowledgments

My gratitude to all the professors and teachers who use this book as a resource. I am so glad you find this a useful reference for your students. For all the students who use this book, I hope it makes learning the art, science, and magic of managing projects a bit easier. For professional project managers, I hope you find some value in the hybrid approach that is incorporated in this book. For the accidental or occasional project manager, I am so glad you have found this book. I hope it will reduce the time you spend figuring out how to organize, lead, and document your project, so you can focus on getting the work done!

Thank you to Kalli Schultea and Amy Odum for shepherding this book through the publication process. I feel so fortunate to work with you and all the fabulous professionals at Wiley.

About the Companion Website

The companion website can be found at

www.wiley/com/go/dionisio/bookoftemplates

Introduction

The project management profession is evolving rapidly. We have moved from methods that were purely predictive (aka waterfall development) or adaptive (Agile), to a more blended or hybrid approach. In fact, today more than 50% of projects are practicing formal or informal hybrid project management.

A Project Manager's Book of Templates provides templates that address project artifacts for predictive management, such as a schedule management plan and a lessons learned register; as well as templates for adaptive and Agile project management, such as a requirements backlog and release plan.

Another shift in the project management profession is that more and more often we are accountable for project and business results. To help you with that, you will find business templates for a business case, startup canvas, project proposal, and other templates to help you present business and strategy level information to senior level stakeholders.

AUDIENCE

This book is written for project managers in traditional fields, such as construction and system implementation, as well as project managers in the digital domain, such as software development, digital product management, and high-tech. Because the book is tactical rather than theoretical, it can be used by novice and advanced practitioners, academia, test prep, and as an on-demand reference.

Those new to project management can use the templates as a guide in collecting and organizing project information. Experienced project managers can use the forms as a template so that they collect a set of consistent data on all projects. In essence, these templates save reinventing the wheel for each project.

A secondary audience is the manager of project managers, a project management office, and program managers. Using the information in this book ensures a consistent approach to project documentation. Adopting these forms on an organizational level will enable a repeatable approach to project management.

This book does not teach project management concepts or describe how to apply project management techniques. Textbooks and classes can fulfill those needs. This book provides an easy way to apply good and consistent practices to projects.

ORGANIZATION

Content in this book is structured to align with the type of work we do on projects. For example, we do some planning, we track information with registers, and we have lots of project documents to help us stay organized. These are the sections in this book:

Starting the Project. Templates in this section are used to address business needs, provide high-level information, and authorize the project. Examples include the project charter and a vision statement.
Project Plans. Templates in this section support developing plans that will be used to guide project delivery. You will find templates for a risk management plan, release plan, change management plan, and many others.

Project Documents. Project documents help us develop and organize information we need for the project. There are many document templates, including estimating worksheets, requirements traceability matrix, and user stories.

Logs and Registers. Logs and registers are updated throughout the project. They help us keep track of dynamic aspects of our projects. You will find templates such as a backlog, stakeholder register, and assumption log.

Reports and Audits. To help track and report on the project we can use various project reports and conduct audits on specific aspects of the project. In this section, you will find a procurement audit, quality report, and project closeout report, among others.

Each template includes a description of the elements included in the template and a sample form that shows how those elements may be arranged. Every template should be tailored and modified to meet your needs. The description and sample templates are here to provide you with ideas to help you collect and manage the information needed to make your project a success.

Most template descriptions follow this format:

- A description of the template is presented along with a list of contents. For the planning forms, there is a description of where the information comes from and where it goes to.
- A section that presents information you can consider for tailoring the templates to fit your needs.
- An alignment section that presents related templates that you will want to make sure are aligned.
- A description table that identifies each of the fields in the template along with a brief explanation.
- A blank copy of the template.

I have also included an appendix that has some samples of combined templates. In the tailoring section, I have made some suggestions on how you can tailor a template by combining it with another. The appendix does not talk you through the details for the templates because the information is available where the templates are first discussed.

As I am sure you know, not all templates will be needed on all projects. Use the templates you need, to the degree that you need them. I hope you find value in the templates I have included in this book.

1

Starting the Project

There is no doubt that starting a project off right is the first step in delivering a successful project. Because projects vary greatly in size, methodology, criticality, and stakeholders, there are several ways you can compile and document the initial project information.

The templates in this section document high-level information that is later elaborated in project plans and project documents. Templates that are commonly used to document the initial project information include

- Project proposal
- Business case
- Project startup canvas
- Vision statement
- Project charter
- Project brief
- Project roadmap

The project proposal, business case, and project startup canvas are usually developed prior to a project being formally approved. They have information that helps relevant stakeholders determine if the need for and benefits of the project justify the investment of time, budget, and resources. These templates may be developed by a project sponsor because the project has not yet been approved and a project manager has not been identified.

The vision statement, project charter, and project brief templates are typically completed once a project has been approved. They provide a high-level view of the project. They may be developed by the project sponsor, the project manager, or by both of them working together.

A project roadmap takes information from the previous documents and creates a summary level graphic display of information. It is developed by the project manager.

Most projects are good with using two or three of these templates to get the project started. Much of the information in these templates is found in multiple templates. Therefore, you should determine the best template for your project and then tailor it to meet the needs of your project by editing, combining, or revising the template.

Project startup templates are usually developed once, before, or shortly after the project is authorized. They provide information on the business environment, justification for the project, financial expectations, and high-level information about the project. If there is a significant change in the environment or the project, the need for the project may be revisited and these documents may be updated.

1.1 PROJECT PROPOSAL

The project proposal is a proposition that describes an opportunity, a solution to a problem, or an approach for undertaking a mandatory project. Ideally, it is no more than one or two pages. A project proposal provides information about the environment, why a project is needed, and presents the proposed response and approach for the project. It is used to provide high-level information so decision makers can determine if the project should be undertaken.

Typical information includes

- Executive summary
- Project background
- Solutions and approach
- Financial information
- Resource requirements
- Conclusion

It may provide information to

- Business plan
- Project startup canvas
- Project charter
- Project brief
- Project roadmap

It is developed once, and then only changed if there are significant changes in the market, the environment, or the need.

Tailoring Tips

Consider the following tips to help tailor the project brief to meet your needs:

- For new product development projects, you can combine the vision statement with the project proposal.
- For smaller projects, the project proposal and business case may be combined.
- If there is relevant research or studies, this information can be included in an appendix.

For hybrid projects, you may include information on methodologies that will be used to deliver effectively.

Alignment

The project brief should be aligned and consistent with the following documents:

- Business case
- Vision statement
- Project startup canvas
- Project charter
- Project brief
- Project roadmap

Description

You can use the element descriptions in Table 1.1 to assist you in developing a project proposal.

TABLE 1.1 Elements of a Project Proposal

Document Element	Description
Executive summary	A succinct overview of the problem or opportunity the proposed project will address along with the ways it will address it. Includes a synopsis of the background, project objectives, and deliverables.
Project background	Information that provides context for the project. May include history, environmental considerations, market conditions, significant events, or other information that shows a compelling need for the project.
Solutions and approach	A summary of the goals and scope of the project, the expected timeline for delivery and a brief description of the methodology that will be used to deliver the project.
Financial information	High-level project funding requirements. May include financial metrics.
Resource requirements	Brief description of the physical resources required, including material, equipment, and sites. A summary of the skill sets and number of team members required.
Conclusion	A summary of the key points.

PROJECT PROPOSAL

Proposed Project Title: ______________________________ Date: ________________________________

Executive Summary:

Project Background:

Solution and Approach:

Goals	Scope

Financial Information

Resource Requirements

Physical Resources	Team Resources

Conclusion

1.2 BUSINESS CASE

The business case describes the business rationale for undertaking a project. It describes the current situation, future vision, threats, opportunities, costs, and benefits. A business case contains market information, financial metrics, and alternatives to consider.

Typical information includes

- Executive summary
- Background information
- Project objectives
- Project benefits
- Project definition
- Market assessment
- Alternatives analysis
- Financial analysis
- Risk overview
- Appendices

The project business case can receive information from

- Project proposal
- Vision statement

It may provide information to

- Project charter
- Project startup canvas
- Project brief
- Project management plan

It is developed once, and then only changed if there are significant changes to the market, financial analysis, or project definition.

Tailoring Tips

Consider the following tips to help tailor the business case to meet your needs:

- For large projects, the alternatives analysis may be a separate document.
- You can include information on project governance for large projects.
- Projects that will use a hybrid approach may want to include a section on project approach to define which aspects of the project will use a predictive approach, which will use an adaptive approach, and how they will integrate.

Alignment

The business case should be aligned and consistent with the following documents:

- Project proposal
- Project charter
- Project management plan

Description

You can use the element descriptions in Table 1.2 to assist you in developing a project business case.

TABLE 1.2 Elements of a Project Business Case

Document Element	Description
Executive summary	Provide a summary description of the business case. Give stakeholders a brief overview of the project.
Background information	Describe the environment and business context for the project. Identify the problem or opportunity. Document how the project aligns with the organization's strategic plan.
Project objectives	The measurable objectives that project intends to achieve.
Project benefits	Describe the intended benefits, such as gaining efficiencies, improving quality, increasing revenue, etc.
Project definition	Describe the key deliverables and the project boundaries. As appropriate, describe the approach to achieve the deliverables.
Market assessment	Provide an overview of the marketplace, including technology availability and legal, environmental, and competitor information.
Alternatives analysis	Describe the alternatives that have been considered and your recommended alternative. For each alternative, provide benefits, costs, and risks. Document how each alternative meets the need or solves the problem. If appropriate, include a feasibility analysis for each alternative.
Financial analysis	Calculate key financial indicators, such as net present value, return on Investment, cash flow, and life cycle cost.
Risk overview	Describe high-level project threats and opportunities along with the potential impacts.
Appendices	Attach supporting information such as spreadsheets, research, and references.

PROJECT BUSINESS CASE

Project Title: ________________________________ Date: ____________________________

Executive Summary

Background Information

Objectives	Success Criteria

Benefits

Project Definition

PROJECT BUSINESS CASE

Market Assessment

Technology availability
Legal and regulatory
Environmental
Competitors

Alternatives Analysis

Alternative	Benefits	Costs	Risks
1.			
2.			
3.			

Financial Analysis

Alternative	NPV	ROI	Cash Flow	Life Cycle Cost
1.				
2.				
3.				

Risk Overview

Appendices

1.3 PROJECT STARTUP CANVAS

The project startup canvas is a high-level visual summary of a project. It is a framework that allows you to capture new project information quickly and succinctly. It is modeled after the business startup canvas and the lean startup canvas. Like those models, the project startup canvas is one page. However, the project startup canvas focuses on key project information rather than market, competitor, and distribution information. The project startup canvas can include information on

- Problem or opportunity
- Solution or scope
- Key deliverables
- Value proposition
- Stakeholders
- Resources
- Costs
- Milestones
- Threats and constraints

The project startup canvas can receive information from

- Project proposal
- Vision statement

It may provide information to

- Project charter
- Project brief
- Work breakdown structure
- Backlog
- Resource requirements
- Cost estimates
- Schedule
- Risk register

The project startup canvas is developed once and is not usually changed unless there is a significant change in the environment, scope, schedule, budget, or resources.

Tailoring Tips

Consider the following tip to help you tailor the project startup canvas to meet your needs:

- If your project is for new product development, consider focusing on distribution channels, customer segments, and revenue streams rather than deliverables, resources, and milestones. While these elements are more business oriented, documenting that information at the start helps keep the project focused on the end users and the market.

Alignment

The project startup canvas should be aligned and consistent with the following documents:

- Project vision statement
- Project scope statement
- Work breakdown structure
- Stakeholder register
- Milestone schedule
- Cost estimates
- Risk register

Description

You can use the element descriptions in Table 1.3 to assist you in developing a project startup canvas.

TABLE 1.3 Elements of a Project Startup Canvas

Document Element	Description
Problem/Opportunity	Identify the problems the project will solve or the opportunities it will meet. Include contextual information if it provides insightful value.
Solution/Scope	Describe the suggested solution to the problems. Note the scope boundaries (what is in scope and what is out of scope).
Deliverables	List key project and product deliverables.
Value proposition	Describe why the project is needed and the value it will provide.
Stakeholders	List the key stakeholders including the customer and end user.
Resources	Identify the key physical resources and important skill sets needed.
Costs	Provide an initial cost estimate. Include fixed and variable costs, and project and maintenance costs.
Milestones	List the key milestones.
Threats/Constraints	Identify significant threats and constraints to the project.

PROJECT STARTUP CANVAS

<table>
<tr><td rowspan="2">Problem/Opportunity</td><td>Solution/Scope</td><td rowspan="2">Value Proposition</td><td>Customers</td><td rowspan="2">Costs</td></tr>
<tr><td>Deliverables</td><td>Resources</td></tr>
<tr><td colspan="2">Milestones</td><td colspan="3">Threats/Constraints</td></tr>
</table>

1.4 PROJECT VISION STATEMENT

The project vision statement provides the future view of a product or service being developed. The project vision statement should be aspirational, yet achievable and realistic. It is developed at the very beginning of a project and is often an input to the business case.

The project vision includes at least

- Target customers
- Needs addressed
- Product or service attributes
- Key benefits

The project vision statement can receive information from

- Project proposal
- Project startup canvas

It may provide information to

- Project charter
- Project brief

The project vision statement is often used for projects that use an Agile methodology to develop digital products. It is developed once, at the beginning of the project.

Tailoring Tips

The following tips can help you tailor the project vision statement to meet your needs:

- Document the business goals that the product is aligned to.
- Identify key competitors and how this product will be better.
- Describe what differentiates this product from similar products in the market.
- You can combine all the information into a sentence or two, or you can follow a formula like the one shown in the sample template.

For hybrid projects, the vision statement can be combined with the project charter (see Section 1.5).

Alignment

The product vision should be aligned and consistent with the following documents:

- Business proposal
- Project startup canvas
- Project charter
- Project brief

Description

You can use the descriptions in Table 1.4 to assist you in developing the vision statement.