



Project Template Mini-Handbook

A WHITE PAPER PROVIDED TO ASPE BY ANDREW GRAHAM, PMP

Project Template Mini-Handbook

*Templates and Strategy Tools for Organizing
And Tracking Key Project Areas*

Compiled by Andrew Graham, PMP
Prepared for ASPE



*Teaching professionals to achieve...
Helping Companies succeed.*

Project Overview Worksheet

<p>Project Goals: (short paragraph or two identifying the business case to put the project in context)</p> <p style="text-align: center;"><i>“Why”</i></p>	
<p>Project Description: (define the end product or service the project exists to produce)</p> <p style="text-align: center;"><i>“What”</i></p>	
<p>High Level Approach: (how will the work get done)</p> <p style="text-align: center;"><i>“How”</i></p>	
<p>Functional Areas Affected:</p> <p style="text-align: center;"><i>“Who”</i></p>	
<p>Desired Implementation Date</p> <p style="text-align: center;"><i>“When”</i></p>	

Project Justification Worksheet

<p>Business Need: (how does this align with strategic business initiatives)</p>	
<p>Feasibility: (what makes you think you can get this done, why should we spend the money)</p>	
<p>Project Justification</p>	

Additional Detail for Project Charter

Product Description: (what is being produced)		
Key Stakeholders:	<i>Function</i>	<i>Role/Responsibility</i>
	PM	
	Sponsor	
	Team Members	
	Available Resources	
	Stakeholders	

<p>Constraints:</p>	
<p>Risks</p>	
<p>Assumptions: (what factors are considered to be true real, or certain)</p>	
<p>Preliminary Schedule and Initial Completion Date:</p> <p>Key Milestones:</p>	
<p>Resource/ Cost Requirements: (HR and materials)</p>	
<p>Initial Budget:</p>	

Project Authorization

Project Name:

I have reviewed the information contained in the Project Charter dated _____, and agree to the baseline commitments specified in it.

_____ Name, Project Manager	_____ Signature	_____ Date
_____ Name, Project Sponsor	_____ Signature	_____ Date
_____ Name, Title	_____ Signature	_____ Date
_____ Name, Title	_____ Signature	_____ Date
_____ Name, Title	_____ Signature	_____ Date
_____ Name, Title	_____ Signature	_____ Date
_____ Name, Title	_____ Signature	_____ Date

Sign and date this form and return to ___ at ___ by ___. The attached copy of the document is provided for your records.

Resource Needs Worksheet

Item	Skill/ Performance Level	Quantity	When	Relationship/ Interface	Alternatives
Human Resources:					
Materials and Equipment:					

Group Exercise- Estimating

Estimating time and cost is integral to the effective planning of any project. Use the following worksheet to determine the weighted average of 10 items.

When an estimate is created, be sure to document your assumptions.

Item	Optimistic	Most Likely	Pessimistic	Weighted Average

Totals:

--	--	--	--	--

Weighted Average:

$$\frac{(\text{Optimistic} + (4 * \text{Most Likely}) + \text{Pessimistic})}{6}$$

6

Assumptions:

Risk Exercise:

- 1. As a group, make a list of as many potential risks you can think of using the brainstorm technique. Be sure to include any assumptions these risks are based on.**

Risks can be found in:

- **Budgets/funding**
- **Schedules**
- **Scope or requirement changes**
- **Technical issues**
- **Personnel issues**
- **Hardware**
- **Contracts**
- **Political concerns**
- **Business risks**
- **Legal risks**
- **Environmental risks**
- **And many other places**

If you like, you can use the categories in the Risk Breakdown Structure (PMBOK p. 244) to guide you

- 2. Pick 10 and determine the probability of each risk and enter it on your Risk Probability and Impact Matrix.**
- 3. Identify the impact on the project if this risk occurred (Use the Guide on p. 245 of your PMBOK to quantify the impact)**
- 4. Identify the probability for each risk**
- 5. Rank order the risk and categorize**
- 6. Using the top three risks, identify triggers and symptoms to look for to identify if the risk occurred**
- 7. Determine a risk response plan for the top three risks.**

Risk Response Plan

1. _____

Triggers:

Strategy:

2. _____

Triggers:

Strategy:

3. _____

Triggers:

Strategy:

Meeting Agenda Sample

MEETING NUMBER:

Date:

Time:

Location:

Chair: _____, **Title:** _____

- 1. Minutes of previous meeting**
- 2. Action List**
- 3. Project Manager's Status Report No _____**
- 4. Project Presentation**
 - A. Describe your project plan in detail
 - a. Why are you using project management discipline
 - b. Why are the benefits of this approach
 - c. What is working
 - d. What did not
 - B. Describe your approach to:
 - a. Scope Management
 - b. Resource Management
 - c. Schedule Management
 - d. Human Resource/ Staffing Management
 - e. Procurement
 - f. Cost Management
 - g. Risk Management
 - h. Quality Management
 - C. How are you going to handle changes
 - D. Describe your approach to executing the project
- 5. Other Business**
- 6. Action Items**
- 7. Next Meeting**

Change Request Form

Request No:

Request

Request Title:

Date:

Originator's Name:

Status:

Sponsor's Name:

Priority:

Assigned To:

Response

Date:

Request Description

Justification

Alternative Solutions

- 1.

- 2.

- 3.

Change Request Form, pg. 2

Impact Assessment

Impacts	Option 1	Option 2	Option 3
Functional Scope			
Schedule			
Effort			
Cost			

Recommendation

Authorization

Action:

Authorized by: _____

Date: _____

Lessons Learned Exercise:

As a group, discuss what worked well for your team and what did not.

What would have made your experience on this project better?

What did you learn about project management? What surprised you?

Develop a plan for how you are going to implement project management tools and techniques into your real work. Name three things you are going to do more of, be better at, or do differently as a result of attending this course.

1.

2.

3.