



## **Blank Project Management Templates**

**Saving Time!**  
**Saving Money!**  
**Saving Stress!**

**Please feel free to copy any of the attached documents.  
You can alter any of them to suit the needs of your  
specific project or organization.**

**If you want information about the services provided by  
Project Agency please call 0208 446 7766 or email  
[event@projectagency.com](mailto:event@projectagency.com)**

**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 [event@projectagency.com](mailto:event@projectagency.com) Do look at [www.projectagency.com](http://www.projectagency.com) 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 [event@projectagency.com](mailto:event@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 and the actions that need to be taken prior to detailed project planning.

<b>Stakeholder</b>	<b>Their interest or requirement from the project</b>	<b>What the project needs from them</b>	<b>Perceived attitude and/or risks</b>

## Milestone Chart

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

MILESTONES	TIME [in suitable units -days, we						
	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 track

\* **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 date]

**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 pr

Signed:

Project Sponsor

Project Manager

Date

## Risk Analysis

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

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



## 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

<b>Project Definition Form [or PID]</b>	
<b>Project Title:</b>	Put here a very brief title
<b>Sponsor:</b>	Insert actual sponsor name
<b>State below the link with the corporate agenda – the actual wording please.</b>	
Put here the actual words in the corporate agenda – showing the link with this project	
<b>Project Background:</b>	The background to the project. Enough information to inform the reader.
<b>Project Benefits:</b>	An outline of what the benefits are to the organisation, individuals or stakeholders in delivering the project
<b>Project Objectives:</b>	The specific objectives for the project. NOTE: the objectives can be one line or more detailed text.
<b>Project Deliverables:</b>	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.
<b>This project will include:</b>	<b>This project will not include:</b>
This section defines the boundaries of the project.	Planning details should <u>not</u> be included at this stage.
<b>Success Criteria:</b>	How you will measure the success of the project. NOTE: the success criteria must be measurable.
<b>Constraints:</b>	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.
<b>Key Assumptions:</b>	The assumptions you are making in putting this document together.
<b>Project Manager:</b>	Who fulfils this role and <u>what they do.</u>
<b>Project Sponsor:</b>	Who fulfils this role and <u>what they do.</u>

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

n 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

<b>Project Title:</b>	Number:
Project Sponsor:	Project Manager:

<b>Progress Report</b>	Report No.
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<b>RAG Status*:</b>	<b>RED / AMBER / GREEN</b>
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<b>Headlines</b>
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<b>Tasks, Milestones, Outcomes delivered this period</b>		Completion dates	
Tasks, Milestones, Outcomes	Comments	Plan	Actual

<b>Major Risks and Issues</b> Include an assessment of the impact and any actions taken
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<b>Recommendations and Requests for Decisions or Support</b>
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<b>Tasks, Milestones, Outcomes scheduled for next period</b>		Completion dates	
Tasks, Milestones, Outcomes	Comments	Plan	Forecast

* RED	"Major concern - escalate to the next level 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	"Minor concern – being actively managed Slippage less than 10% of remaining time or budget, or quality impact is minor. Remedial plan in place.
GREEN	"Normal level of attention No material slippage. No additional attention needed

**Project management templates from Project Agency – please alter to suit your needs**

Highlight/Progress Report

Project Name: PROJECT NAME

Reporting Period:		Project Manager:		Project Spon						
Prepared by:		Date Prepared:		RAG Status						
Project Description:				Project End D						
Key Deliverables Completed this period		Key Deliverables Outstanding this period		Key D						
			Delivery Date							
Risk Management		Issue Management								
Log No	Risk	Action/Status	Log No	Issue	Action/Status	Req No				
Financial Statement										
Capital				Revenue						
Source	Budget	Actual	Remaining	Forecast	Source	Budget	Actual	Remaining	Forecast	Source
			0					0		

**Project Agency Tele: 020 8446 7766**

## Change Control Sheet

<b>Project Title</b>	<b>Project Number</b>
<b>Project Manager</b>	

CHANGE REQUEST		
Originator Phone:	Date of request	Change request no. allocated by Change Controller
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

<b>Project Title</b>	<b>Project Number</b>
<b>Project Manager</b>	

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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



**Project Management - Check Sheet**

Amend this Check Sheet to suit your project

<b>A: SET UP - INITIATION</b>	Y	N	COMMENTS	
<ol style="list-style-type: none"> <li>1 Developed the business case?</li> <li>2 Is a full options appraisal necessary?</li> <li>3 Is the project in line with the strategic plan?</li> <li>4 Has the project received sign off by sponsor or project board?</li> </ol>				<ol style="list-style-type: none"> <li>5 Have you identified the critical path for the project?</li> <li>6 Have you developed a communications plan and included its component parts into the Gantt charts?</li> <li>7 Are you continuing to carry out risk analysis throughout the project?</li> <li>8 Are quality standards high? How do you know?</li> </ol>
<p><b>B: SET UP - DEFINITION</b></p> <ol style="list-style-type: none"> <li>1 Has a PID or project definition form been completed?</li> <li>2 Are roles explicit and documented?</li> <li>3 Are levels of authority clear?</li> <li>4 Have you carried out a stakeholder analysis and planned accordingly?</li> <li>5 Have you assessed risks and put a plan into action to monitor them?</li> <li>6 Are you clear what is driving the project Quality, Cost or Time (1 only)</li> <li>7 Have clear project review procedures been established?</li> <li>8 Has planning started for a start up workshop (or series of workshops)?</li> <li>9 Team selection - have you got the correct mix of skills and professional experience?</li> </ol>				<p><b>D: DELIVERY</b></p> <ol style="list-style-type: none"> <li>1 Have you identified the appropriate type of control – loose versus tight?</li> <li>2 Project reporting – are you clear who reports what and to whom and how?</li> <li>3 Do you have a clear procedure for managing change?</li> <li>4 Have you developed a planned versus actual schedule? How up to date is it?</li> <li>5 Tolerance – have you an agreed tolerance figure?</li> <li>6 Variations – are these quickly flagged?</li> </ol>
<p><b>C: DELIVERY PLANNING</b></p> <ol style="list-style-type: none"> <li>1 Have you broken the project down into its component parts – work breakdown</li> <li>2 How accurate are your estimates? If a low percentage then recalculate.</li> <li>3 Have you developed a milestone chart or produced a Gantt chart?</li> <li>4 Have you developed an overall project budget? Have you sought advice from financial experts</li> </ol>				<p><b>E: CLOSEDOWN AND REVIEW</b></p> <ol style="list-style-type: none"> <li>1 Post project review has been planned?</li> <li>2 Learning identified?</li> <li>3 Is the project still delivering the benefits intended?</li> <li>4 Is there a case for abandoning the project – off schedule or delivered a significant part of it?</li> <li>5 End of project review reports are produced and circulated?</li> </ol>



## **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