**Project**

**Templates**

**PROJECT MANAGEMENT OFFICE**

**PROJECT :**

**PROJECT #:**

**PROJECT CO-ORDINATOR:**

# Project Stakeholders

Project stakeholders include individuals or organizations whose interest may be positively or negatively affected by the project. By identifying stakeholders up front, we can determine their needs and expectations, and try to manage and influence those expectations to the betterment of the project.

## Corporate Stakeholders

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| **Stakeholder** | **Anticipated Role/ Influence On Project** | **Additional Comments / Requirements** |
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## Client Stakeholders

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| --- | --- | --- |
| **Stakeholder** | **Anticipated Role/ Influence On Project** | **Additional Comments / Requirements** |
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## Public Stakeholders

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| **Stakeholder** | **Anticipated Role/ Influence On Project** | **Additional Comments / Requirements** |
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## Other Stakeholders

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| --- | --- | --- |
| **Stakeholder** | **Anticipated Role/ Influence On Project** | **Additional Comments / Requirements** |
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# Project Team

### Internal (Our Company)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name** | **Dept./Co.** | **Responsibility** | **Tel. #** | **Fax #** | **E-Mail ID** |
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### External (Contract)

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| **Name** | **Dept./Co.** | **Responsibility** | **Tel. #** | **Fax #** | **E-Mail ID** |
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### External (Client)

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### Other people/Groups involved in project

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| **Name** | **Dept./Co.** | **Responsibility** | **Tel. #** | **Fax #** | **E-Mail ID** |
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# Project Charter

## Project Overview Section A

Project Description: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Requested by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Tel. #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date request made: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date required by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Functional Manager(s): Tel. #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Tel. #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Tel. #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Manager: Tel. #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Sponsor: Tel. #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Client contact: Tel. #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Project Objective Section B

Project Purpose: Provide a few lines that capture the essence of the project, and answers **why** we aredoing the project.

**Why?**

### Project Scope / deliverables: The project scope should frame the entire project. It addresses what we will do and is articulated as high-level deliverables (outcomes or results) of the project. If the project charter is approved, these high level deliverables will be broken down into discrete project activities.

**What?**

### MEasurable Success indicators: Documents **how** the success of your project will be measured.

**How?**

### Scope Includes/Excludes: Used to clarify the gray areas around what is included (and not included) as part of the project scope

|  |  |
| --- | --- |
| **Includes** | **Does Not Include** |
|  |  |

## Project Parameters Section C

### Cost/Benefit

### Constraints: List constraints (non-negotiable parameters) within which the project must take place. They generally involve the scope, timing, cost, or quality of the project.

### Assumptions/Risks: List any assumptions being made concerning the project, as well as anticipated risks and risk mitigation strategies.

### Customer support Requirements: State general requirements of client group(s) concerning the project

## Work Authorization Section D

|  |  |
| --- | --- |
| Planned Start \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Completion \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Cost \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Effort \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Priority: Low Medium High  Client Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Project Manager \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Project Sponsor \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Actual Start \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Completion \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Total Cost \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Total Effort \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

### Project Completion Notes:

# Work Breakdown Structure (WBS)

# Scope Management Plan

The Scope Management Plan describes the procedures to follow in the event of scope changes within the project. Its use and formality may vary depending on the size, scope and risk associated with the project. The nature of the stakeholders involved may also affect how changed to scope are to be handled. The following headings provide an example of what may be included in this document:

### Changes affecting COST

|  |  |  |  |
| --- | --- | --- | --- |
|  | Authorization Level Required For Changes Causing An Increases In Over-all Cost | | |
|  | Less than \_\_\_\_\_\_ dollars | < dollars > | Greater than \_\_\_\_\_ dollars |
| Required authorization level |  |  |  |
| Required Documentation |  |  |  |
| Required Communication |  |  |  |

### Changes affecting Timing of Project

|  |  |  |  |
| --- | --- | --- | --- |
|  | Authorization Level Required For Changes Causing A Project Milestone Delay | | |
|  | Less than \_\_\_\_\_\_ days | < days > | Greater than \_\_\_\_\_ days |
| Required authorization level |  |  |  |
| Required Documentation |  |  |  |
| Required Communication |  |  |  |

### Changes affecting Quality/Scope of Project

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Authorization Levels For Changes Affecting Project Quality/Scope | | |  | |  |
|  | Future Activities | Current Activities | Completed Activities | |
| Required authorization level |  |  |  | |
| Required Documentation |  |  |  | |
| Required Communication |  |  |  | |

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| --- | --- | --- | --- | --- | --- |
|  | Authorization Levels For Changes Affecting Project Quality/Scope ... Continued | | |  |  |
|  | Reduction in Scope/Quality | Required to meet agreed to Scope/Quality | Enhancements to Scope/Quality |
| Required authorization level |  |  |  |
| Required Documentation |  |  |  |
| Required Communication |  |  |  |

# Communications/Reporting Plan

This document outlines the formal communication and reporting requirements for the primary project stakeholders. It should include the nature of the communication required (meeting, written report, conference call, etc.), the frequency, the level of detail, and any sign-off requirements that may result.

### Senior Management

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Form/Level of Detail of Communication (Meeting, Report, etc.) | Frequency/Dates | Originator | Distribution/Information Flow | Comments |
|  |  |  |  |  |
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### Functional Management

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Form/Level of Detail of Communication (Meeting, Report, etc.) | Frequency/Dates | Originator | Distribution/Information Flow | Comments |
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### Project Team

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| --- | --- | --- | --- | --- |
| Form/Level of Detail of Communication (Meeting, Report, etc.) | Frequency/Dates | Originator | Distribution/Information Flow | Comments |
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### Client

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| Form/Level of Detail of Communication (Meeting, Report, etc.) | Frequency/Dates | Originator | Distribution/Information Flow | Comments |
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### Other Stakeholders

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Form/Level of Detail of Communication (Meeting, Report, etc.) | Frequency/Dates | Originator | Distribution/Information Flow | Comments |
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# Risk Register

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Risk Event** | **Risk Type** | **Risk Probability** | **Risk Impact** | **Risk Response (may be a combination)** | **Description  of Response** |
| **(+/-)** | **L**ow, **M**oderate, **H**igh | **L**ow, **M**oderate, **H**igh | Accept, Avoid, Transfer, Mitigate, Escalate, Share, Exploit, Enhance |
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# Appendix Resource Planner

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| --- | --- | --- | --- | --- | --- |
|  |  | **Date Required** | |  |  |
| **Activity ID** | **Resource/Material Requirement** | **Early Start** | **Late Start** | **Supplier** | **Person Responsible** |
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# Risk Control Sheet

Risk Item No. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Revision \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ WBS Impacted \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| Risk Description : |
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| Risk Impact: |
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| Risk Solution(s): |
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| Solution(s) Impact: |
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Authorization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Issue Log

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Issue # | Description of Issue and Impact on the Project | Priority (L/M/H) | Date Reported | Reported By | Assigned To | Status | Date Resolved | Resolution/Comments |
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# Scope Change Request Log

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Change Request # | Date Submitted | Description of Change Request | Impact on Project | | | | Status | Approved by | Date Resolved |
| Cost | Time | Quality | Other? |
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# Project Change Control Form

Project Name:

Project Number:

Project Manager:

Change Request:

Description (background):

## Impact Assessment

#### Impact on Service/Quality:

#### Impact on Schedule:

#### Impact on Cost:

#### Immediate Action Required? (include communication/notification of change requirements):

## Authorization

Requested by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Requested: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Approved by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Approved: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Authorized by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Authorized: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Document Distribution Record

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| **Document** | **Date Sent** | **Distribution Method** | **Sent To** |
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# Communication Record

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| **Date** | **Name** | **Notes** | **Action Prime** | **Follow-up** |
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Project Meeting

**Date**:  
**Time** (from/to):

**Meeting called by**:  
**Type of meeting**:  
**Facilitator**:

**Attendees**:

**Please bring**:

|  |  |  |
| --- | --- | --- |
| **----- Agenda Topics -----** | | |
| *Item* | *Person Responsible* | *Allotted Time* |
|  |  |  |
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**Special notes**:

# ----- Agenda Topics -----

|  |  |  |  |
| --- | --- | --- | --- |
| **Item 1** | **Time** (from/to): | | |
| Discussion: | | | |
|  | | | |
| Conclusions: | | | |
|  | | | |
| Action Items: | | Person Responsible: | Deadline: |
|  | |  |  |

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| --- | --- | --- | --- |
| **Item 2** | **Time** (from/to): | | |
| Discussion: | | | |
|  | | | |
| Conclusions: | | | |
|  | | | |
| Action Items: | | Person Responsible: | Deadline: |
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| **Item 3** | **Time** (from/to): | | |
| Discussion: | | | |
|  | | | |
| Conclusions: | | | |
|  | | | |
| Action Items: | | Person Responsible: | Deadline: |
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| --- | --- | --- | --- |
| **Item 4** | **Time** (from/to): | | |
| Discussion: | | | |
|  | | | |
| Conclusions: | | | |
|  | | | |
| Action Items: | | Person Responsible: | Deadline: |
|  | |  |  |

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| --- | --- | --- | --- |
| **Item 5** | **Time** (from/to): | | |
| Discussion: | | | |
|  | | | |
| Conclusions: | | | |
|  | | | |
| Action Items: | | Person Responsible: | Deadline: |
|  | |  |  |

**Special Notes**: