INITIATE PHASE



 **PROJECT CHARTER TEMPLATE**

|  |  |
| --- | --- |
| PROJECT NAME |  |
| PROJECT SPONSOR |  |
| PROJECT MANAGER | CUSTOMER |
| PROJECT STAKEHOLDERS |  |
| STAKEHOLDER(S) RESPONSIBILITIES |  |
| BUSINESS OBJECTIVES |  |
| PROJECT OBJECTIVES (SMART) |  |
| DELIVERABLES |  |
| PROJECT COMPLETION DATE | BUDGET |
| ASSUMPTIONS |  |
| LINKAGE TO STRATEGIC OBJECTIVES |  |
| AGREEMENT LINE PROJECT SPONSOR | PROJECT MANAGER |

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# RISK MANAGEMENT PLANNING

*Questions to Ponder: What are their Probabilities and their Impacts?*

1. Are the Customer Requirements well understood?
2. Are costs and time estimate detailed or top down?
3. How likely is the Project Scope to change?
4. Will Resources be dedicated to the project or on part time basis?
5. Will Key Resources be reassigned or lost to the project?
6. Will deadlines be pushed out by the customer or others?
7. Will the customer be responsive and meet key milestones?
8. Will we have technical problems
9. Have we addressed the effects of single-point estimates and path convergence?

Low

*Impact*

*Probability*

Low

High

High

High Risk

Low Risk

Moderate

Risk

**R**

**ISK**

**A**

**NALYSIS**

**O**

**PTIONS**

1.

Avoid

2.

Accept

3.

Mitigate

4.

Transfer

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**INITIATE PHASE – PLANNING A PROJECT KICK-OFF MEETING**

|  |  |
| --- | --- |
| **DOCUMENT PREPARATION FORMATION** |  |
| PROJECT NAME | PROJECT MANAGER | DATE PREPARED |
| **SPONSOR INFORMATION** |  |
| SPONSOR |  | CONTACT INFORMATION |
| **ATTENDEES** |  |
| NAME |  | E-MAIL ADDRESS |

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Welcome & Introductions

Establish Ground Rules

Executive Perspective

Project Overview:

Project Objectives

Project Charter

Proposed Solution

Project Deliverables

Project Accomplishments To Date

Project Schedule and Major Milestones (A)

Team Roles & Responsibilities (B)

Communication Plan (C)

Summary and Close

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# PLAN PROJECT

**WORK BREAKDOWN STRUCTURE TEMPLATE**

|  |
| --- |
| (B) PROJECT TASK WORKSHEET \_\_\_\_\_\_\_\_\_\_\_\_ ASSIGNED PERSON \_\_\_\_\_\_\_\_\_\_ |
| Task  |  Subtasks |  Activities | Time  |  Estimate  |  Deliverables  |  Costs  |  Comments |
|  |  |  |  |  |  |  |  |
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 **PLAN PROJECT TEMPLATE**

|  |  |
| --- | --- |
| PROJECT SCHEDULE AND MAJOR MILESTONES | (A) |
| Tasks and Milestones Baseline Date  |  Cost Owner Completion Date |
| 1.01.11.21.2.1 (Milestone)1.2.2 (Milestone) |  |  |  |  |  |
| 2.02.1 (Milestone) |  |  |  |  |  |
| 3.03.1 (Milestone)3.2 (Milestone) |  |  |  |  |  |
| 4.04.1 (Milestone)4.24.2.1 (Milestone)4.2.2 (Milestone) |  |  |  |  |  |

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# EXECUTE PROJECT

 **STATUS REPORTING TEMPLATE**

W

EEKLY

S

TATUS

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)

To: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

From: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

For Week

Ending

:

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**SSUMPTIONS**

**I**

**SSUES**

**RISKS**

List the week’s activities and accomplishments for this project. Refer

to WBS when reporting accomplishments, plans, and issues.

1.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

List the next week’s objectives and significant activities for this project

1.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

List any new, changed, or significant target dates

List any assumptions.

List any issues (new or open) that require an action plan.

List any new or continuing risks associated with the project.

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CHANGE CONTROL REQUESTTEMPLATE - SAMPLE

**D**

**OCUMENT**

**P**

**REPARATION**

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P

ROJECT

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P

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ROJECT

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**ROPOSED**

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ESCRIPTION

–

*ble the team to*

*Define the desired change in sufficient detail to ena*

*evaluate it. Identify all WBS elements affected by the change.*

R

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FOR

C

HANGE

–

*Describe why this change is necessary or desirable*

S

CHEDULE

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–

*d cost to*

*State the effect on the project schedule an*

*ell as overall*

*complete this change. Include duration and cost of the specific change as w*

*impact, if known.*

A

SSUMPTIONS

–

*List*

*any business and technical assumptions.*

**A**

**UTHORIZATION**

**–**

**P**

**ROJECT**

**MANAGER**

Name

Signature

Phone

Date

**A**

**UTHORIZATION**

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**F**

**UNDING**

**S**

**PONSOR**

Name

Signature

Phone

Date

144

145

 Are there deliverables outstanding?

 Are there any internal outstanding commitments?

 Have all costs been appropriately charged to the project?

 Has the charge number for accounting been closed?

 Have all tasks been completed?

 Has management been notified regarding availability of project personnel?

 Has excess project material been dealt with?

 Has the Project Plan been achieved with all supporting information?

 Have suppliers been notified regarding any outstanding commitments?

 Are all stakeholders aware of project closeout?

 Has the project been transitioned to operations and support?

**Project – *Check off***

 Have your take good care of high performing project team members

 Have project team members been appropriately rewarded?

 Was there a project celebration?

 Was the celebration successful?

**Personnel Internal**

 Is a process in place for maintaining the customer relationship?

 Have vendors and subcontractors been advised of project status and of future opportunities?

**External Issues**

**Project Closeout Checklist - Template**

**Document Preparation Information**

Project Name Prepared By Date Prepared

**Close Phase**