

Business Case

Prepared by:	
Proposed Project title:	

Why is the project needed?
What other options were considered?
What are its objectives?
What are the benefits?
How will success be measured? (success criteria)
What are the boundaries or scope of the project?
What are the constraints – consider time, quality, cost
How much will it cost and how long will it take? Is this realistic?
What are the risks associated with this and can they be managed?
Who needs to be involved and how?
Conclusion – should the project proceed?

Project Charter

These are commonly used headers but you can rearrange the headers to suit your own project

Project Sponsor – write the name of the person here			
Project Background and Timescales		Assumptions	
Write a little about the context and how this project		Write down any assumptions you have when writing this document.	How will you know you are on track to succeed? Write down your measurable steps along the way.
Start Date:			
Completion			
Objectives		Scope	
Write down the overall objectives of the Project.		What is included in the project and what is not included?	
Team		Risks	Constraints/Drivers
Write down the name of the project leader and team members and if relevant, their department or specialism that they bring or represent.		Write down what the key risks are here.	What elements of this project are fixed no matter what – cost, quality, time, skills, people?
Stakeholders		Resources	Benefits/Deliverables
Write down the names and positions of anyone who is affected by the project or the outcomes of it.		This may be the budget or it may be the amount of person hours, full time equivalents or people the project has assigned to it.	What are you expecting to gain as a business from the project completion? What will you actually deliver at the end?

Kick-Start Meeting Agenda

Project title:	Meeting date, time and duration:
Attendees:	Venue:

No.	Agenda Item
1.	Clarify roles and responsibilities – agree team contract
2.	Review Business Case
3.	Complete Project Charter / PID – discuss and confirm <ul style="list-style-type: none"><input type="checkbox"/> Assumptions<input type="checkbox"/> Risks<input type="checkbox"/> Resources<input type="checkbox"/> Milestones / deliverables<input type="checkbox"/> Constraints<input type="checkbox"/> Benefits
4.	Outline Communications Plan
5.	Next steps
6.	Any other items
7.	Date of next meeting

Title	Project Risk Register
Project	
Date	
Project Manager	

Date	Description of Risk	Likelihood	Impact	Risk Rating	Action (Avoid, reduce, fallback, transfer, share, accept etc.)

Change Control Log

Project Title:	
Project Manager:	

[illegible]

Title	Project Issue Register
Project	
Date	
Project Manager	

Date raised	Description of Issue	Evaluation/ Impact	Escalation Required?	Resolution

Project Progress Report

Project Title	
Date	
Project Sponsor	
Project Manager	

Project Status: (to shade in)	RED	AMBER	GREEN
Headlines			
Tasks, Milestones, Deliverable this period			Completion dates
Tasks, Milestones, Deliverables	Comments	Planned	Actual
Risks and Issues Include an assessment of the impact and any actions taken			
Tasks, Milestones, Deliverables scheduled for next period			Completion dates
Tasks, Milestones, Deliverables	Comments	Planned	Forecast

(Insert type of meeting) **Agenda**

Project title:	Meeting Date:
Attendees:	Purpose of meeting:

No.	Agenda Item	Raised by
1.	Review actions from last meeting	
2.	Recurring item (eg Project progress)	
3.	Recurring item (eg Risk register)	
4.	Recurring item (eg Change request)	
5.	Local items	
6.	Date of next meeting	

Project Action Log

Project Title:	Meeting date, time and venue:
Purpose of meeting:	Present:

No	Review Actions Week commencing xx	By who	Complete?
1.			
2.			
3.			
4.			
5.			
6.			
7.			
	New Actions Week Commencing xx		
1.			
2.			
3.			
4.			
5.			
6.			
7.			

Project Management Checklist

	Scoping Stage	Y	N	N/A	Comment
1	Is the project in line with the strategic plan?				
2	Is a full options appraisal necessary?				
3	Has a proposal been authorised?				
	Defining Stage	Y	N	N/A	Comment
4	Have stakeholders been consulted?				
5	Has a Business Case been developed?				
6	Has the project received sign off by the sponsor or project board?				
	Design and Plan Stage	Y	N	N/A	Comment
7	Has a PID form been completed?				
8	Are roles explicit and documented?				
9	Are levels of authority clear?				
11	Stakeholder analysis and communications plan put in place?				
12	Risk assessment and register complete?				
13	Is it clear what's driving the project – Quality, Cost, Time?				

14	Have project review procedures been established?				
15	Has the project kick-off been held?				
16	Is the team established?				
17	Is there a clear WBS?				
18	Was sufficient time invested into estimating (costs and duration)?				
19	Is there a Gantt chart with milestones identified?				
20	Is there a defined a project budget, developed with advice from financial experts if needed?				
21	Have you identified the critical path for the project?				
	Implementation Stage	Y	N	N/A	Comment
22	Are quality control measures in place and working?				
23	Are you clear who reports to whom and when?				
24	Do you have a clear procedure for managing variations or changes and is it being used?				
25	Have you developed a planned versus actual schedule and is it up to date?				
26	Have you an agreed tolerance figure?				
	Handover, Closedown & Review Stage	Y	N	N/A	Comment
27	Does the project meet with designated acceptance criteria?				
28	Has the post project review been planned?				
29	Has the learning been identified and lessons learned report circulated?				
30	Is the project delivering benefits?				
	Operations and Benefits Realisation	Y	N	N/A	Comment

31	Are Benefits being monitored?				
32	Did the project achieve the intended Benefits or Outcomes				
33	Is there a plan for Impact Assessment?				
	BAU and Assessing Impact	Y	N	N/A	Comment
34	Has Impact been assessed?				
35	Did the project deliver the desired impact?				
36	Has learning been publicised to the relevant audiences?				

Title	Handover and Acceptance Record
Project	
Date of plan	
Project Manager	

Purpose
<p>The purpose is to record handover and acceptance of product (outcome, service, deliverable) completion of project.</p>

Criteria for acceptance?

Deviations from acceptance criteria?

Additional comments on user acceptance?

Sign off					
	Name	Approve	Disapprove	Signature	Date
Sponsor					
Senior User					
Project Manager					