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15 Essential Project Documents: Compact Templates You Can Use



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Use documents to support decisions

A compact template should make ownership and evidence easy to find.

Set common controls

Give every record a project ID, document owner, version, status date and approval state. Link related records so a decision in one place does not contradict the current plan elsewhere.

The running case

The Visitor Badge Pilot covers one office and two reception desks over a six-week project window. Its total funding limit is 8,000. The following filled extracts illustrate different moments in that project.

Adapt the fields

Copy the field structure, replace the example and remove fields that serve no purpose. Use the detail needed by the project's size, uncertainty and required authority.

TAKE IT TO YOUR PROJECT

Create a project record index with owner and current-version links.

01 / One-page project charter

Authorise a defined project with an accountable sponsor.

Copy these fields

Project name; business need; intended outcome and measure; key deliverables; exclusions; high-level milestones; funding limit; major assumptions and risks; sponsor; project manager; approval record.

Filled extract

Visitor Badge Pilot. Test a consistent badge process at one office's two reception desks. Six-week window; funding limit 8,000. Sponsor approves the charter; operating lead defines and accepts readiness evidence.

Use and control

State the authority delegated to the project manager and decisions retained by the sponsor. A charter's high-level target does not replace a detailed estimate or schedule.

TAKE IT TO YOUR PROJECT

Confirm the sponsor, delegated authority and approval state before using the charter.

02 / Scope and acceptance statement

Define the boundary and the evidence that will establish completion.

Copy these fields

Scope version; included outputs; excluded work; affected locations and interfaces; acceptance criteria per output; acceptance owner; assumptions; constraints; change route.

Filled extract

Include two desk configurations, operator instructions, training and forty synthetic test visits. Exclude other offices and permanent building-access changes. Operating lead accepts agreed scenarios and training evidence.

Use and control

Separate a desired feature from an approved deliverable. Link criteria to tests or reviews and route proposed boundary changes through the authorised decision process.

TAKE IT TO YOUR PROJECT

Check that each scoped output has an acceptance owner and observable criteria.

03 / WBS dictionary entry

Explain one work package clearly enough to estimate and accept it.

Copy these fields

WBS code and name; deliverable description; boundaries; owner; required inputs; acceptance criteria; assumptions; estimate reference; related interfaces.

Filled extract

1.2 Desk Configuration. Owner: IT lead. Output: approved badge setup on two reception desks. Input: authorised badge design. Acceptance: both setups pass the agreed print-and-scan scenarios.

Use and control

Describe the work package's output rather than only naming an activity. Link its estimate and schedule records so scope, cost and time remain traceable.

TAKE IT TO YOUR PROJECT

Draft one dictionary entry for a work package with an unclear boundary.

04 / Activity and dependency log

Turn work packages into dated, owned delivery activities.

Copy these fields

Activity ID; work-package reference; description; owner; duration and calendar; predecessors; resource need; planned dates; actual dates; remaining duration; status date.

Filled extract

A: confirm design, two working days. B: configure desks, three days after A. C: test setup, two days after B. This seven-day chain is an extract, not the whole six-week project.

Use and control

State dependency type and any justified lag. Reconcile resource availability and acceptance activities before using dates as commitments.

TAKE IT TO YOUR PROJECT

Trace one activity's input, output and successor before confirming its duration.

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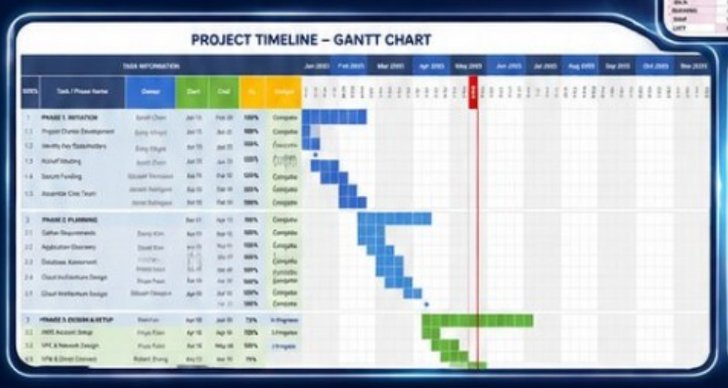
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05 / Cost baseline and funding summary

Keep approved delivery budget distinct from total funding.

Copy these fields

Scope and estimate version; cost categories; quantities and rates; assumptions; contingency basis; approved baseline; management reserve; total funding; approval and forecast date.

Filled extract

Labour 3,600; equipment 1,800; testing 800; training 600: subtotal 6,800. Contingency 700 gives baseline 7,500. Management reserve 500 gives total funding 8,000.

Use and control

Record reserve authority and accounting treatment. A reserve is not automatically available for an unapproved scope addition; preserve the baseline when reporting a new forecast.

TAKE IT TO YOUR PROJECT

Reconcile the cost categories, baseline and funding limit independently.

06 / Risk register

Connect uncertain events to owned responses and review triggers.

Copy these fields

Risk ID; cause-event-effect statement; probability and impact basis; priority; owner; response; action owner and date; trigger; residual assessment; review date.

Filled extract

R01: an unconfirmed badge-stock shipment may arrive late, delaying rehearsal. Illustrative probability 0.30 and cost impact 1,000 give EMV 300. Procurement lead confirms supply and an approved fallback.

Use and control

Record the meaning of scales and the evidence supporting estimates. EMV is an expected value, not a guarantee of loss or automatically the correct contingency allowance.

TAKE IT TO YOUR PROJECT

Write a complete cause-event-effect statement for the most uncertain dependency.

07 / Issue log

Control problems that already exist and require action.

Copy these fields

Issue ID; observed problem; discovery date; evidence; delivery impact; priority; action owner; proposed resolution; due date; escalation trigger; closure evidence.

Filled extract

101: the test printer is unavailable for the planned rehearsal. IT lead confirms a loan unit by day 10. Escalate to the project manager if availability remains unconfirmed at the agreed checkpoint.

Use and control

Separate the existing issue from related future risks. Close it only when the agreed resolution evidence exists and affected plans have been updated.

TAKE IT TO YOUR PROJECT

Give one open issue a clear next action and an observable closure condition.

08 / Stakeholder register

Plan engagement around real interests and responsibilities.

Copy these fields

Stakeholder or group; role; interest and effect; influence or authority; current concern; needed input or decision; engagement owner; channel; next review.

Filled extract

Reception operators: users of the new process. Concern: extra steps at busy periods. Operating lead arranges a supervised rehearsal and captures feedback before the readiness decision.

Use and control

Treat the record as a working view rather than a permanent label. Review it when responsibilities, concerns or the project's effects change.

TAKE IT TO YOUR PROJECT

Identify one affected group that has not yet reviewed the proposed process.

09 / RACI responsibility matrix

Clarify delivery and accountability for specific outputs or decisions.

Copy these fields

Rows: outputs or decisions. Columns: agreed roles. Legend: Responsible performs; Accountable owns the outcome; Consulted gives input; Informed receives updates. Use one Accountable role per row.

Filled extract

Desk configuration: IT lead R/A, project manager C, operating lead C. Operating acceptance: operating lead A, project manager R for coordination, IT lead C. State the activity precisely so roles are unambiguous.

Use and control

Confirm the assignments with the people involved. A matrix supports responsibility clarity but does not create authority that the governance arrangements have not granted.

TAKE IT TO YOUR PROJECT

Find a row with unclear accountability and agree its single outcome owner.

10 / Communication plan

Match the message, audience and decision timing.

Copy these fields

Information need; audience; purpose; sender or owner; channel and location; frequency or trigger; response expectation; escalation route; accessible format.

Filled extract

Weekly delivery note: sponsor and operating lead; owner project manager; issued each Friday. Include accepted outputs, forecast, top exceptions and decisions required before the next checkpoint.

Use and control

Define an urgent escalation separately from the routine update. Check that recipients can find the authoritative record and know what response is required.

TAKE IT TO YOUR PROJECT

Replace one generic update with a message designed for a specific decision.

11 / One-page status report

Provide a dated assessment that supports the next decision.

Copy these fields

Status date; overall assessment and reason; accepted outputs; milestone target and forecast; budget, actuals and EAC; key risks and issues; next actions; decision requests.

Filled extract

At the week-four review, desk configuration is accepted and rehearsal is pending. Approved baseline 7,500; current EAC 7,800, an anticipated excess of 300. Explain the estimate basis and response options.

Use and control

Keep the target, forecast and actual position distinct. Include owners and decision dates for exceptions instead of relying only on a colour or percentage.

TAKE IT TO YOUR PROJECT

Ask whether a reader can identify the next required decision in thirty seconds.

12 / Change request

Make a proposed change reviewable before committing the project.

Copy these fields

Request ID and originator; current approved position; proposed change; reason; options; scope, schedule, cost, risk and benefit effects; recommendation; authority; decision and conditions.

Filled extract

CR01 proposes adding a second building. Initial assessment: 1,800 additional cost and five working days, subject to confirmation. This is outside the current one-office scope and remains unapproved.

Use and control

Record the decision before updating controlled commitments. If urgent action has a delegated route, preserve who authorised it and reconcile the records afterward.

TAKE IT TO YOUR PROJECT

Identify the evidence needed before the authority can decide the request.

13 / Decision log

Preserve the outcome, authority and reasoning people rely on.

Copy these fields

Decision ID; question; options considered; evidence; decision maker and authority; outcome; date; conditions; affected records; communication and follow-up owner.

Filled extract

D01: Sponsor confirms the pilot remains one office. Wider rollout will be considered separately after operating results are reviewed. Project manager communicates the boundary and links it to the scope record.

Use and control

An open question is not an approved decision. Mark pending items clearly and record the required owner and latest useful decision date.

TAKE IT TO YOUR PROJECT

Check one important decision against its original authority and evidence.

14 / Acceptance record

Document what was reviewed and exactly what was accepted.

Copy these fields

Output and version; agreed criteria; evidence references; reviewer; defects or conditions; accepted, conditional or rejected outcome; authorised acceptance owner; date; follow-up responsibilities.

Filled extract

Two desk setups pass all forty agreed synthetic visit scenarios and operator training is confirmed. Operating lead accepts the specified versions and support instructions, with evidence links recorded.

Use and control

Do not extend acceptance to other offices or untested changes. Any conditions need owners and dates, with a clear statement of what the conditional decision permits.

TAKE IT TO YOUR PROJECT

Draft an acceptance record that names both the output version and criteria.



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15 / Closure and lessons summary

Leave a controlled record of completion and continuing responsibility.

Copy these fields

Delivered and accepted scope; cost and schedule outcome; contract and invoice position; operating handover; open obligations; benefits owner and review; lessons and improvement actions; closure authority.

Filled extract

Pilot outputs are accepted and handed over. Final cost is 7,700 against baseline 7,500, an excess of 200. Operating lead owns the later performance review; sponsor decides closure from the evidence.

Use and control

Explain the authorised funding treatment and remaining obligations. Convert lessons into specific improvements with owners rather than a list of general observations.

TAKE IT TO YOUR PROJECT

Verify that continuing support, benefits and obligations have named owners.

Keep the templates connected

A small, consistent record set is more useful than fifteen isolated files.

Follow one change

An approved request may alter scope, schedule, budget, risks and communication. Update the relevant controlled versions and link the decision that authorised the change.

Maintain a record index

For each document, show purpose, owner, current version, approval state and location. Archive superseded versions so people can trace history without accidentally relying on them.

Review usefulness

Remove duplication and add detail where a real decision needs it. The templates illustrate management structure; project-specific policies and contractual requirements determine the required approvals.

TAKE IT TO YOUR PROJECT

Trace one reported status claim back to its acceptance, plan or cost evidence.