

Generic PMI Project Management Process Template

(Aligned to PMI PMBOK® Standards – For Any Project/Site)

1.0 Purpose

This document establishes a standard process for managing projects using the Project Management Institute (PMI) Project Management Body of Knowledge (PMBOK®) framework. It provides guidance for consistent project initiation, planning, execution, monitoring/controlling, and closure across the organization.

2.0 Scope

This process applies to all projects, regardless of size or industry. It is flexible and can be adapted to suit the complexity and requirements of individual projects.

3.0 Applicability

This template is applicable to all project managers, team members, sponsors, and stakeholders involved in organizational projects.

4.0 Roles & Responsibilities

Project Sponsor

- Approves project charter and funding.
- Provides strategic direction and decision support.

Project Manager

- Leads planning, execution, monitoring, and closure.
- Manages scope, schedule, cost, quality, resources, risks, and communications.
- Provides progress reports and ensures successful delivery.

Business Analyst (optional)

- Captures requirements and documents business needs.
- Supports development of Scope of Work (SOW) and Level of Effort (LOE).

Stakeholders

- Provide input on requirements and deliverables.
- Approve key milestones and final project outputs.

Project Team Members

- Execute assigned tasks.
- Contribute to deliverable development and problem resolution.

5.0 PMI Process Groups

Initiating

- Develop Project Charter (objective, scope, risks, deliverables, key roles).
- Identify stakeholders.
- Obtain sponsor approval.

Planning

- Define project scope, schedule, and budget.
- Create Work Breakdown Structure (WBS).
- Develop management plans for scope, schedule, cost, quality, resources, communication, risk, procurement, and stakeholder engagement.
- Approve Scope of Work (SOW).

Executing

- Assign resources and responsibilities.
- Conduct formal kickoff meeting.
- Manage teams and deliverables.
- Ensure quality assurance throughout work execution.

Monitoring & Controlling

- Track progress against baseline (scope, schedule, cost, quality).
- Monitor risks and issues; update risk register.
- Implement change control for scope/budget/schedule changes.
- Provide status updates to stakeholders.

Closing

- Obtain formal acceptance of deliverables.
- Document lessons learned.
- Complete knowledge transfer to operational teams.
- Archive all project records.

6.0 Records

All project documentation should be retained according to organizational retention policies, including:

- Project Charter

- Scope of Work (SOW)
- Management Plans
- Risk/Issue Logs
- Change Requests
- Lessons Learned Register
- Final Closure Report

7.0 References

- PMBOK® Guide, latest edition
- Organization's strategic plans, policies, and procedures

8.0 Acronyms

- LOE – Level of Effort
PMBOK – Project Management Body of Knowledge
PMI – Project Management Institute
PMP – Project Management Professional
SOW – Scope of Work
WBS – Work Breakdown Structure