

# Generic PMI Project Management Process Template

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(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