Contents

1 Project Management

Project Management org templates

1.1 STRATEGY ARTIFACTS

Documents that are created prior to or at the start of the project that address strategic, business, or high-level information about the project. Strategy artifacts are developed at the start of a project and do not normally change, though they may be reviewed throughout the project.

- Business case 1.10. A business case is a value proposition for a proposed project that may include financial and nonfinancial benefits.

- Business model canvas. This artifact is a one-page visual summary that describes the value proposition, infrastructure, customers, and finances. These are often used in lean start-up situations.

- Project brief. A project brief provides a high-level overview of the goals, deliverables, and processes for the project.

- Project charter. A project charter is a document issued by the project initiator or sponsor that formally authorizes the existence of a project and provides the project manager with the authority to apply organizational resources to project activities.

- Project vision statement. This document is a concise, high-level description of the project that states the purpose, and inspires the project team to contribute to the project.

- Roadmap. This document provides a high-level time line that depicts milestones, significant events, reviews, and decision points.

1.2 LOGS AND REGISTERS

Logs and registers are used to record continuously evolving aspects of the project. They are updated throughout the project. The terms log and register are sometimes used interchangeably. It is not uncommon to see the term risk register or risk log referring to the same artifact.

- Assumption log. An assumption is a factor that is considered to be true, real, or certain, without proof or demonstration. A constraint is a factor that limits the options for managing a project, program, portfolio, or process. An assumption log records all assumptions and constraints throughout the project.

- Backlog. A backlog is an ordered list of work to be done. Projects may have a product backlog, a requirements backlog, impediments backlog, and so forth. Items in a backlog are prioritized. The prioritized work is then scheduled for upcoming iterations.

- Change log. A change log is a comprehensive list of changes submitted during the project and their current status. A change can be a modification to any formally controlled deliverable, project management plan component, or project document.

- Issue log. An issue is a current condition or situation that may have an impact on the project objectives. An issue log is used to record and monitor information on active issues. Issues are assigned to a responsible party for follow up and resolution.

- Lessons learned register. A lessons learned register is used to record knowledge gained during a project, phase, or iteration so that it can be used to improve future performance for the project team and/or the organization.

- Risk-adjusted backlog. A risk-adjusted backlog is a backlog that includes work and actions to address threats and opportunities.

- Risk register. A risk register is a repository in which outputs of risk management processes are recorded. Information in a risk register can include the person responsible for managing the risk, probability, impact, risk score, planned risk responses, and other information used to get a high-level understanding of individual risks.

- Stakeholder register. A stakeholder register records information about project stakeholders, which includes an assessment and classification of project stakeholders.

1.3 PLANS

A plan is a proposed means of accomplishing something. Project teams develop plans for individual aspects of a project and/or combine all of that information into an overarching project management plan. Plans generally are written documents but may also be reflected on visual/ virtual whiteboards.

- Change control plan. A change control plan is a component of the project management plan that establishes the change control board, documents the extent of its authority, and describes how the change control system will be implemented.

- Communications management plan. This plan is a component of the project, program, or portfolio management plan that describes how, when, and by whom information about the project will be administered and disseminated.

- Cost management plan. This plan is a component of a project or program management plan that describes how costs will be planned, structured, and controlled.

- Iteration plan. This plan is a detailed plan for the current iteration.

- Procurement management plan. This plan is a component of the project or program management plan that describes how a project team will acquire goods and services from outside of the performing organization.

- Project management plan. The project management plan is a document that describes how the project will be executed, monitored and controlled, and closed.

- Quality management plan. This plan is a component of the project or program management plan that describes how applicable policies, procedures, and guidelines will be implemented to achieve the quality objectives.

- Release plan. This plan sets expectations for the dates, features, and/or outcomes expected to be delivered over the course of multiple iterations.

- Requirements management plan. This plan is a component of the project or program management plan that describes how requirements will be analyzed, documented,and managed.

- Resource management plan. This plan is a component of the project management plan that describes how project resources are acquired, allocated, monitored, and controlled.

- Risk management plan. This plan is a component of the project, program, or portfolio management plan that describes how risk management activities will be structuredand performed.

- Scope management plan. This plan is a component of the project or program management plan that describes how the scope will be defined, developed, monitored, controlled, and validated.

- Schedule management plan. This plan is a component of the project or program management plan that establishes the criteria and the activities for developing, monitoring, and controlling the schedule.

- Stakeholder engagement plan. This plan is a component of the project management plan that identifies the strategies and actions required to promote productive involvement of stakeholders in project or program decision making and execution.

- Test plan. This document describes deliverables that will be tested, tests that will be conducted, and the processes that will be used in testing. It forms the basis for formally testing the components and deliverables.

1.4 HIERARCHY CHARTS

Hierarchy charts begin with high-level information that is progressively decomposed into greater levels of detail. The information at the upper levels encompasses all the information at the lower or subsidiary levels. Hierarchy charts are often progressively elaborated into greater levels of detail as more information is known about the project.

- Organizational breakdown structure. This chart is a hierarchical representation of the project organization, which illustrates the relationship between project activities and the organizational units that will perform those activities.

- Product breakdown structure. This chart is a hierarchical structure reflecting a products components and deliverables.

- Resource breakdown structure. This chart is a hierarchical representation of resources by category and type.

- Risk breakdown structure. This chart is a hierarchical representation of potential sources of risks.

- Work breakdown structure. This chart is a hierarchical decomposition of the total scope of work to be carried out by the project team to accomplish the project objectives and create the required deliverables.

1.5 BASELINES

A baseline is the approved version of a work product or plan. Actual performance is compared to baselines to identify variances.

- Budget. A budget is the approved estimate for the project or any work breakdown structure (WBS) component or any schedule activity.

- Milestone schedule. This type of schedule presents milestones with planned dates.

- Performance measurement baseline. Integrated scope, schedule, and cost baselines

are used for comparison to manage, measure, and control project execution.

- Project schedule. A project schedule is an output of a schedule model that presents linked activities with planned dates, durations, milestones, and resources.

- Scope baseline. This baseline is the approved version of a scope statement, work breakdown structure (WBS), and its associated WBS dictionary that can be changed using formal change control procedures and is used as the basis for comparison to actual results.

1.6 VISUAL DATA AND INFORMATION

Visual data and information are artifacts that organize and present data and information in a visual format, such as charts, graphs, matrices, and diagrams. Visualizing data makes it easier to absorb data and turn it into information. Visualization artifacts are often produced after data have been collected and analyzed. These artifacts can aid in decision making and prioritization.

- Affinity diagram. This diagram shows large numbers of ideas classified into groups for review and analysis.

- Burndown/burnup chart. This chart is a graphical representation of the work remaining in a timebox or the work completed toward the release of a product or project deliverable.

- Cause-and-effect diagram. This diagram is a visual representation that helps trace an undesirable effect back to its root cause.

- Cumulative flow diagram (CFD). This chart indicates features completed over time, features in development, and those in the backlog. It may also include features at intermediate states, such as features designed but not yet constructed, those in quality assurance, or those in testing.

- Cycle time chart. This diagram shows the average cycle time of the work items completed over time. A cycle time chart may be shown as a scatter diagram or a bar chart.

- Dashboards. This set of charts and graphs shows progress or performance against important measures of the project.

- Flowchart. This diagram depicts the inputs, process actions, and outputs of one or more processes within a system.

- Gantt chart. This bar chart provides schedule information where activities are listed on the vertical axis, dates are shown on the horizontal axis, and activity durations are shown

as horizontal bars placed according to start and finish dates.

- Histogram. This bar chart shows the graphical representation of numerical data.

- Information radiator. This artifact is a visible, physical display that provides information

to the rest of the organization, enabling timely knowledge sharing.

- Lead time chart. This diagram shows the trend over time of the average lead time of the items completed in work. A lead time chart may be shown as a scatter diagram or a bar chart.

- Prioritization matrix. This matrix is a scatter diagram where effort is shown on the horizontal axis and value on the vertical axis, divided into four quadrants to classify items by priority.

- Project schedule network diagram. This graphical representation shows the logical relationships among the project schedule activities.

- Requirements traceability matrix. This matrix links product requirements from their origin to the deliverables that satisfy them.

- Responsibility assignment matrix (RAM). This matrix is a grid that shows the project resources assigned to each work package. A RACI chart is a common way of showing stakeholders who are responsible, accountable, consulted, or informed and are associated with project activities, decisions, and deliverables.

- Scatter diagram. This graph shows the relationship between two variables.

- S-curve. This graph displays cumulative costs over a specified period of time.

- Stakeholder engagement assessment matrix. This matrix compares current and desired stakeholder engagement levels.

- Story map. A story map is a visual model of all the features and functionality desired for a given product, created to give the project team a holistic view of what they are building and why.

- Throughput chart. This chart shows the accepted deliverables over time. A throughput chart may be shown as a scatter diagram or a bar chart.

- Use case. This artifact describes and explores how a user interacts with a system to achieve a specific goal.

- Value stream map. This is a lean enterprise method used to document, analyze, and improve the flow of information or materials required to produce a product or service for a customer. Value stream maps can be used to identify waste.

- Velocity chart. This chart tracks the rate at which the deliverables are produced, validated, and accepted within a predefined interval.

1.7 REPORTS

Reports are formal records or summaries of information. Reports communicate relevant (usually summary level) information to stakeholders. Often reports are given to stakeholders who are interested in the project status, such as sponsors, business owners, or PMOs.

- Quality report. This project document includes quality management issues, recommendations for corrective actions, and a summary of findings from quality control activities. It may include recommendations for process, project, and product improvements.

- Risk report. This project document is developed progressively throughout the risk management processes and summarizes information on individual project risks and the level of overall project risk.

- Status report. This document provides a report on the current status of the project. It may include information on progress since the last report and forecasts for cost and schedule performance.

1.8 AGREEMENTS AND CONTRACTS

An agreement is any document or communication that defines the intentions of the parties. In projects, agreements take the form of contracts or other defined understandings. A contract is a mutually binding agreement that obligates the seller to provide the specified product, service, or result and obligates the buyer to pay for it. There are different types of contracts, some of which fall within a category of fixed-price or cost-reimbursable contracts.

- Fixed-price contracts. This category of contract involves setting a fixed price for a well-defined product, service, or result. Fixed-price contracts include firm fixed price (FFP), fixed-price incentive fee (FPIF), and fixed price with economic price adjustment (FP-EPA), among others.

- Cost-reimbursable contracts. This category of contracts involves payments to the seller for actual costs incurred for completing the work plus a fee representing seller profit. These contracts are often used when the project scope is not well defined or is subject to frequent change. Cost-reimbursable contracts include cost plus award fee (CPAF), cost plus fixed fee (CPFF), and cost plus incentive fee (CPIF).

- Time and materials (T&M). This contract establishes a fixed rate, but not a precise statement of work. It can be used for staff augmentation, subject matter expertise, or other outside support.

- Indefinite delivery indefinite quantity (IDIQ). This contract provides for an indefinite quantity of goods or services, with a stated lower and upper limit, and within a fixed

time period. These contracts can be used for architectural, engineering, or information technology engagements.

- Other agreements. Other types of agreements include memorandum of understanding (MOU), memorandum of agreement (MOA), service level agreement (SLA), basic ordering agreement (BOA), among others.

1.9 OTHER ARTIFACTS

The documents and deliverables described here do not fit into a specific category; however, they are important artifacts that are used for a variety of purposes.

- Activity list. This document provides a tabulation of schedule activities that shows the activity description, activity identifier, and a sufficiently detailed scope of work description so project team members understand what work is to be performed.

- Bid documents. Bid documents are used to request proposals from prospective sellers. Depending on the goods or services needed, bid documents can include, among others:

  - Request for information (RFI),
  - Request for quotation (RFQ), and
  - Request for proposal (RFP).

- Metrics. Metrics describe an attribute and how to measure it.

- Project calendar. This calendar identifies working days and shifts that are available

for scheduled activities.

- Requirements documentation. This document is a record of product requirements and relevant information needed to manage the requirements, which includes the associated category, priority, and acceptance criteria.

- Project team charter. This document records the project team values, agreements,

and operating guidelines, and establishes clear expectations regarding acceptable behavior by project team members.

- User story. A user story is a brief description of an outcome for a specific user, which is a promise of a conversation to clarify details.

1.10 ARTIFACTS APPLIED ACROSS PERFORMANCE DOMAINS

Different artifacts are more likely to be useful in different performance domains. While the delivery approach, product, and organizational environment will determine which artifacts are most applicable for a specific project, there are some performance domains that are more likely to make use of specific artifacts. Table 4-3 suggests the performance domain(s) where each artifact is more likely to be of use; however, the project manager and/or project team has the ultimate responsibility for selecting and tailoring the artifacts for their project.

Artifact	Team[1]	Stake[2]	DA LC [3]	Plan[4]	P Work[5]	Deliv[6]	Measu[7]	U
Strategy:								
Business case		x		x				
Project brief		x		x				
Project charter		x		x				
Project vision statement		x		x				
Roadmap		x	x	x				
Log and Register Artifacts:								
Assumption log				x	x	x		x
Backlog				x	x	x		
Change log					x	x		
Issue log					x			
Lessons learned register					x			
Risk-adjusted backlog				x				x
Risk register				x	x	x		x
Stakeholder register		x		x				
Plan:				x	x	x		
Change control plan		x		x	x			
Communications management plan				x				
Cost management plan				x				
Iteration plan				x				
Procurement management plan				x	x			
Project management plan		x		x	x			
Quality management plan				x	x			
Release plan				x		x		
Requirements management plan				x		x		
Resource management plan				x	x			
Risk management plan				x	x			x
Scope management plan				x		x		
Schedule management plan				x	x	x		
Stakeholder engagement plan		x		x				
Test plan				x	x	x	x	
Hierarchy Chart:								
Organizational breakdown structure	x	x		x				
Product breakdown structure				x		x		
Resource breakdown structure	x			x	x		x	
Risk breakdown structure					x			x
Work breakdown structure				x		x	x	
Baseline:								
Budget				x	x		x	
Milestone schedule			x	x	x		x	
Performance measurement baseline				x	x	x	x	
Project schedule				x	x		x	
Scope baseline				x	x		x	
Visual Data and Information:				x	x	x	x	
Affinity diagram				x	x		x	
Burn chart				x		x	x	
Cause-and-effect diagram					x	x		x
Cycle time chart						x	x	
Cumulative flow diagram						x	x	
Dashboard					x		x	
Flow chart					x	x	x	
Gantt chart				x	x		x	

2 Meetings and events

Meetings are an important means for engaging the project team and other stakeholders. They are a primary means of communication throughout the project.

2.1 Backlog refinement.

At a backlog refinement meeting, the backlog is progressively elaborated and (re)prioritized to identify the work that can be accomplished in an upcoming iteration.

2.2 Bidder conference.

Meetings with prospective sellers prior to the preparation of a bid or proposal to ensure all prospective vendors have a clear and common understanding of the procurement. This meeting may also be known as contractor conferences, vendor conferences, or pre-bid conferences.

2.3 Change control board.

A change control board meeting includes the group of people who are accountable for reviewing, evaluating, approving, delaying, or rejecting changes to the project. The decisions made at this meeting are recorded and communicated to the appropriate stakeholders. This meeting may also be referred to as a change control meeting.

2.4 Daily standup.

A standup is a brief collaboration meeting during which the project team reviews its progress from the previous day, declares intentions for the current day, and highlights any obstacles encountered or anticipated. This meeting may also be referred to as a daily scrum.

2.5 Iteration planning.

An iteration planning meeting is used to clarify the details of the backlog items, acceptance criteria, and work effort required to meet an upcoming iteration commitment. This meeting may also be referred to as a sprint planning meeting.

2.6 Iteration review.

An iteration review is held at the end of an iteration to demonstrate the work that was accomplished during the iteration. This meeting may also be referred to as a sprint review.

2.7 Kickoff.

A kickoff meeting is a gathering of project team members and other key stakeholders at the outset of a project to formally set expectations, gain a common understanding, and commence work. It establishes the start of a project, phase, or iteration.

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[1] Team
[2] Stakeholders
[3] Dev Approach and Life Cycle
[4] Planning
[5] Project Work
[6] Delivery
[7] Measurement
[8] Uncertainty

2.8   Lessons learned meeting.

A lessons learned meeting is used to identify and share the knowledge gained during a project, phase, or iteration with a focus on improving project team performance. This meeting can address situations that could have been handled better in addition to good practices and situations that produced very favorable outcomes.

2.9   Planning meeting.

A planning meeting is used to create, elaborate, or review a plan or plans and secure commitment for the plan(s).

2.10   Project closeout.

A project closeout meeting is used to obtain final acceptance of the delivered scope from the sponsor, product owner, or client. This meeting indicates that the product delivery is complete.

2.11   Project review.

A project review meeting is an event at the end of a phase or a project to assess the status, evaluate the value delivered, and determine if the project is ready to move to the next phase, or transition to operations.

2.12   Release planning.

Release planning meetings identify a high-level plan for releasing or transitioning a product, deliverable, or increment of value.

2.13   Retrospective.

A retrospective is a regularly occurring workshop in which participants explore their work and results in order to improve both process and product. Retrospectives are a form of lessons learned meeting.

2.14   Risk review.

A meeting to analyze the status of existing risks and identify new risks. This includes determining if the risk is still active and if there have been changes to the risk attributes (such as probability, impact, urgency, etc.). Risk responses are evaluated to determine if they are effective or should be updated. New risks may be identified and analyzed and risks that are no longer active may be closed. Risk reassessment is an example of a risk-review meeting.

2.15   Status meeting.

A status meeting is a regularly scheduled event to exchange and analyze information about the current progress of the project and its performance.

2.16   Steering committee.

A meeting where senior stakeholders provide direction and support to the project team and make decisions outside of the project teams authority.

3 Other methods

The methods described in this section dont fit into a specific category; however, they are common methods that are used for a variety of purposes on projects.

3.1 Impact mapping.

Impact mapping is a strategic planning method that serves as a visual roadmap for the organization during product development.

3.2 Modeling.

Modeling is the process of creating simplified representations of systems, solutions, or deliverables such as prototypes, diagrams, or storyboards. Modeling can facilitate further analysis by identifying gaps in information, areas of miscommunication, or additional requirements.

3.3 Net Promoter Score (NPSő).

An index that measures the willingness of customers to recommend an organizations products or services to others. The score is used as a proxy for gauging the customers overall satisfaction with an organizations product or service and the customers loyalty to the brand.

3.4 Prioritization schema. Prioritization schema are methods used to prioritize portfolio, program, or project components, as well as requirements, risks, features, or other product information.

Examples include a multicriteria weighted analysis and the MoSCoW (must have, should have, could have, and wont have) method.

3.5 Timebox.

A timebox is a short, fixed period of time in which work is to be completed, such as 1 week, 2 weeks, or 1 month.