

PM Asset *Library*

A complete, fill-in set of project management templates for predictive, hybrid, and adaptive work, from the first idea to the benefits review, plus the organizational assets that hold them together.

CONTENTS	APPROACH	FORMAT	VERSION
89 templates · 6 organizational assets	ALL	Fillable PDF · 9 Excel companions	v1.2 · October 2026

The library at a glance

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IDEA	DELIVERY				VALUE		

Stages 1 to 5 follow the PMBOK® Guide Eighth Edition focus areas (Initiating, Planning, Executing, Monitoring and Controlling, Closing). Stage 0 adds the business justification before a project exists, and Stage 6 follows the benefits after it ends. The basis is the PMBOK® Guide Eighth Edition, The Standard for Project Management, and the PMI Agile Practice Guide. Terms from earlier editions carry their edition label, and terms PMI does not define are labeled practice.

START HERE · THE ESSENTIAL KIT (17)

- **T09** Project Charter
- **T11** Stakeholder Register
- **T14** Kickoff Deck & Agenda
- **T16** Project Management Plan
- **T29** Milestone List
- **T35** RACI Matrix
- **T41** Communications Matrix
- **T43** Risk Register
- **T54** Meeting Agenda & Minutes
- **T55** Decision & Action Log
- **T56** Issue & Impediment Log
- **T62** Status Report
- **T65** Change Request Form
- **T66** Change Log
- **T73** Lessons Learned Register
- **T75** Deliverable Acceptance & Sign-off Form
- **T77** Project Closure Checklist

Built by Amy Price. Every template is fully open: thresholds, dates, amounts, and authority levels are fill-in fields; specific values appear only on the completed examples.

1 How to use the library

SIX STEPS FOR ANY PROJECT

1. **Start with the organization.** Read the methodology guide (O1) and the governance policy (O2). Together they say how projects run here and who approves what.
2. **Classify the project** Small, Medium, or Large with O2 section 2. The class sets the minimum governance.
3. **Choose the approach** (predictive, hybrid, or adaptive) with T08 before writing the plan.
4. **Pick your templates** from the O1 template map: Required, Optional, or Not needed for your class.
5. **Fill in and tidy.** Each template has italic guidance and a quality test under every section. Delete the guidance before sharing.
6. **File and version** every document with O3: one folder per stage, standard file names, and a new version for every approved change.

2 Conventions

Numbers	T01 to T89 are project templates, grouped by stage; O1 to O6 are organizational assets. Numbers never change; new templates are added at the end
Tier	Essential (E): the minimum kit for any project · Standard (S): most projects · Situational (X): when a trigger applies, such as a vendor or a new team
Approach	All works for any approach · P/H predictive and hybrid · A/H adaptive and hybrid. Labeled sections inside a template cover the differences
Layout	P portrait for documents and forms · L landscape for registers, matrices, workbooks, and slides · P/L portrait with landscape table pages
Fillable PDF	Text boxes and checkboxes work in Acrobat, Preview, or a browser. Save a copy before filling
Excel	Nine assets have a workbook (eight that calculate, plus the searchable glossary) with the same name: How to use, a blank tab, and a worked example. The PDF holds the summary and sign-off
Files	T##_Template-Name_v#.# . A change makes a new version; approved files are never edited in place
Labels	PMI terms carry their source (for example PMBOK® Guide 6th Ed.). Practice marks common industry terms PMI doesn't define. O6 defines every term

3 About the completed examples

Every template ends with a completed example from one fictional project, so the library reads as a single connected story. **Northfield Creative Group** is a fictional 120-person marketing and design agency with four studios. Its **Client Onboarding Portal** cuts client onboarding from 5 business days to 2, runs hybrid (contracts, privacy, and migration predictive; the portal in two-week sprints; training predictive), and runs from January 11 to July 9, 2027 with a \$200,000 authorized budget. The cast: Dana Whitfield (sponsor), Amy Price (project manager), Marcus Reyes (product owner), Priya Shah (IT), Elena Torres (contracts and privacy), and the vendor Clearpath Software (fictional). Names, dates, and figures are illustrative.

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#	TEMPLATE	USE IT TO	APPR.	TIER	LAY.	EXCEL
Stage 0 · Business Justification						
T01	Project Request & Intake Form	Capture every new request the same way for fair triage	All	S	P	
T02	Needs Assessment	Define the gap between today and the desired state	All	S	P	
T03	Environmental & Strategic Analysis	Scan the conditions that shape scope and risk	All	X	P	
T04	Feasibility Study	Test whether each option can realistically succeed	All	X	P	
T05	Business Case	Justify the investment and request a decision	All	S	P	
T06	Cost-Benefit Analysis (+ Excel)	Quantify costs and benefits: NPV, ROI, payback, IRR	All	X	L	Yes
T07	Benefits Management Plan	Define how benefits are created, measured, and kept	All	S	P	
T08	Approach Selection & Tailoring Worksheet	Choose the delivery approach and record tailoring	All	S	P	
Stage 1 · Initiating						
T09	Project Charter	Authorize the project and the PM's authority	All	E	P	
T10	Assumption & Constraint Log	Log assumptions and constraints and validate them	All	S	L	
T11	Stakeholder Register	List stakeholders, their interests, and engagement	All	E	L	
T12	Governance, Roles & Escalation Model	Set who decides what, tolerances, and escalation	All	S	P	
T13	Compliance Register	List compliance requirements and the evidence needed	All	S	L	
T14	Kickoff Deck & Agenda	Launch the project with a shared understanding	All	E	L	
T15	Team Charter & Working Agreement	Agree how the team works together, with DoR and DoD	All	S	P	
T87	Project Team Roles & Hierarchy Guide	Pick roles by approach and agree decision rights	All	S	P	
T88	Organizational Structures Guide	See how the structure shapes the PM's authority	All	S	P	
Stage 2 · Planning						
T16	Project Management Plan	Integrate the plans, baselines, reserves, and reviews	All	E	P	
T17	Scope Management Plan	Define, baseline, accept, and control scope	All	S	P	
T18	Requirements Management Plan	Plan how requirements are gathered, traced, changed	All	S	P	
T19	Requirements Documentation	Record requirements and check their quality	All	S	P/L	
T20	Requirements Traceability Matrix	Trace each requirement to work, test, and acceptance	All	S	L	
T21	Project Scope Statement	Describe scope, deliverables, and exclusions	P/H	S	P	
T22	WBS & WBS Dictionary	Break scope into work packages with a dictionary	P/H	S	L	
T23	Product Vision & Roadmap	State the product vision, outcomes, and roadmap	A/H	S	L	
T24	Story Map	Map the user journey and slice releases	A/H	X	L	
T25	Product Backlog & User Story Template	Write user stories and keep an ordered backlog	A/H	S	L	
T26	Release Plan	Plan releases from goals, capacity, and velocity	A/H	S	L	
T27	Schedule Management Plan	Set how the schedule is built, baselined, tracked	All	S	P	
T28	Project Schedule	Sequence activities with dependencies and a Gantt view	P/H	S	L	
T29	Milestone List	Track key milestones: baseline, forecast, actual	All	E	L	

#	TEMPLATE	USE IT TO	APPR.	TIER	LAY.	EXCEL
T30	Financial (Cost) Management Plan	Set cost methods, reserves, thresholds, reporting	All	S	P	
T31	Cost Estimate & Budget Workbook (+ Excel)	Estimate costs and roll them up into the budget	All	S	L	Yes
T32	Quality Management Plan	Set quality standards, metrics, and Definition of Done	All	S	P	
T33	Resource Management Plan	Plan how people and resources are found and managed	All	S	P	
T34	Resource Calendar & Capacity Plan (+ Excel)	Compare demand with capacity week by week	All	S	L	Yes
T35	RACI Matrix	Assign R, A, C, I with exactly one A per row	All	E	L	
T36	Rewards & Recognition Plan	Plan fair recognition for behaviors and results	All	X	P	
T37	Team Development & Training Plan	Close team skill gaps with development actions	All	X	L	
T38	Stakeholder Engagement Plan	Plan how each stakeholder group is engaged	All	S	P	
T39	Stakeholder Engagement Assessment Matrix	Compare current and desired engagement	All	S	L	
T40	Communications Management Plan	Set communication rules, audiences, and methods	All	S	P	
T41	Communications Matrix	List every recurring communication on one page	All	E	L	
T42	Risk Management Plan	Set risk method, scales, appetite, and responses	All	S	P	
T43	Risk Register	Log risks with scores, owners, and responses	All	E	L	
T44	Procurement Management Plan	Decide what to buy and how to procure it	All	X	P	
T45	Statement of Work	Define the work a vendor or team will deliver	All	X	P	
T46	Solicitation Documents (RFI, RFQ, RFP)	Request information, quotes, or proposals	All	X	P	
T47	Vendor Selection Scorecard (+ Excel)	Score bids with weighted criteria	All	X	L	Yes
T48	Change Management Plan	Control project changes and who approves them	All	S	P	
T49	Configuration Management Plan	Control versions of documents and deliverables	All	X	P	
T50	Change Readiness & Culture Assessment	Assess readiness and culture before a change	All	X	P	
T51	Organizational Change & Adoption Plan	Plan adoption by the people affected	All	S	P	
T52	Transition & Rollout Plan	Plan cutover, support, hypercare, and go/no-go	All	S	P	
T82	Kanban Board & Flow Policy	Set up a Kanban board, WIP limits, and flow rules	A/H	S	L	
T83	Agile Estimation & Prioritization Guide	Size and order work consistently	A/H	S	P	
T84	Agile Metrics Tracker (+ Excel)	Track velocity, burnup, flow, and the forecast	A/H	S	L	Yes
T85	User Persona	Describe the people the product serves	A/H	X	P	
T86	MVP & Experiment Canvas	Test an assumption with the smallest useful release	A/H	X	P	
T89	Contract Types Guide	Choose a contract type and check the key terms	All	S	P	
Stage 3 · Executing						
T53	Team Onboarding Plan	Bring a new team member up to speed in 30 days	All	S	P	
T54	Meeting Agenda & Minutes	Run focused meetings and record the outcomes	All	E	P	
T55	Decision & Action Log	Log decisions and actions with owners	All	E	L	
T56	Issue & Impediment Log	Log issues and impediments through to closure	All	E	L	
T57	Iteration Plan & Review	Plan and review each iteration	A/H	S	P	
T58	Test & UAT Plan	Plan testing and UAT and record the results	All	S	P	

#	TEMPLATE	USE IT TO	APPR.	TIER	LAY.	EXCEL
T59	Quality Control Checklist	Check a deliverable against its standards	All	S	P	
T60	Vendor Performance Scorecard (+ Excel)	Score vendor delivery each month	All	X	L	Yes
T61	Knowledge Transfer Plan	Transfer critical knowledge before people move on	All	X	P	
Stage 4 · Monitoring & Controlling						
T62	Status Report	Report status weekly with RAG and asks	All	E	P	
T63	Executive Performance Dashboard	Give steering a monthly view of performance	All	S	L	
T64	Risk Report	Report top risks, trend, and reserve monthly	All	S	P	
T65	Change Request Form	Request a change with its impact analysis	All	E	P	
T66	Change Log	Log every change request and decision	All	E	L	
T67	Exception Report & Recovery Plan	Report a forecast breach and the options	All	S	P	
T68	Root Cause Analysis Worksheet	Find root causes and corrective actions	All	X	P	
T69	Phase-Gate Review Checklist	Record each gate review and decision	P/H	S	P	
T70	Customer Satisfaction Survey	Measure client satisfaction	All	S	P	
T71	Compliance Audit Checklist	Audit compliance evidence and track findings	All	S	L	
T72	Retrospective Template	Run a retrospective and agree one or two actions	All	S	P	
T73	Lessons Learned Register	Capture lessons during the project	All	E	L	
T74	Team Performance Assessment	Assess team effectiveness at set points	All	X	P	
Stage 5 · Closing						
T75	Deliverable Acceptance & Sign-off Form	Record formal acceptance of a deliverable	All	E	P	
T76	Transition Readiness Checklist	Check readiness before go-live	All	S	P	
T77	Project Closure Checklist	Close the project completely	All	E	P	
T78	Final Project Report	Report final results against the baselines	All	S	P	
T79	Close-Out Lessons Learned Report	Report lessons at close and route them to O4	All	S	P	
Stage 6 · Benefits Realization						
T80	Benefits Realization Tracker (+ Excel)	Track benefits after the project closes	All	S	L	Yes
T81	Benefits Realization Report & PIR	Review benefits achieved and decide next steps	All	S	P	
Organizational assets · used in every stage						
O1	PM Methodology Guide	The organization's standard way of running projects	All	S	P	
O2	Governance & Approval Policy	Default classes, approvals, gates, and escalation	All	X	P	
O3	Document Control & Project Records Standard	Folders, names, versions, retention, archiving	All	S	P	
O4	Lessons Learned Repository	Lessons from every project in one searchable place	All	S	L	
O5	Historical Project Data & Benchmarks (+ Excel)	Past results and benchmark rates for estimating	All	X	L	Yes
O6	PM Glossary (+ Excel)	One plain-language definition for every term	All	S	P	Yes