

PROFESSIONAL PM ASSET LIBRARY · MASTER REFERENCE

Project Lifecycle *Playbook*

The complete project management lifecycle, from the first request to benefits realized after close. Every step names the document it produces, and every document maps to a template in this library.

Owner Amy Price, Project Manager **Version** 1.5 · October 2026 **Basis** PMBOK® Guide – Eighth Edition, PMI Agile Practice Guide
Covers Predictive, hybrid, and adaptive delivery

How to use this playbook

Use this as the operating map for any project. Start at the stage your project is in, follow the numbered steps, and pull the templates listed beside them. The stages follow the five Focus Areas in the PMBOK® Guide – Eighth Edition (Initiating through Closing). Two additional stages sit at the edges: business justification before a project exists, and benefits realization after it ends.

Templates are built once to work on any project. Where a delivery approach changes what a document needs, the template carries an approach-specific section rather than becoming a separate file. Separate templates exist only where the approaches genuinely differ (a WBS versus a product backlog, for example).

Scale to the project. A two-month internal project needs the 17-template Essential kit, not all 89. On smaller projects, subsidiary plans can be reduced to short sections inside the Project Management Plan; on larger ones, each stands as its own document.

APPROACH FIT

- ALL** Use on every project. Approach-specific sections inside.
- P / H** Predictive work, or the predictive parts of a hybrid project.
- A / H** Adaptive work, or the adaptive parts of a hybrid project.

USAGE TIER

- ESSENTIAL** Every project, any size. The minimum professional standard.
- STANDARD** Medium and large projects, or any project with real risk or visibility.
- SITUATIONAL** Only when the trigger applies: vendors, formal investment review, regulated work.

The lifecycle at a glance

0 Business Justification Is this worth doing?	1 Initiating Authorize and align	2 Planning Define how the work gets done	3 Executing Lead the team, deliver value	4 Monitoring & Controlling Measure, report, correct	5 Closing Accept, transition, close out	6 Benefits Realization Did it deliver the value?
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Stages 1–5 are the PMBOK® Focus Areas. Stages 0 and 6 (shaded) happen outside the project's own life but determine whether it was worth running. Executing and Monitoring & Controlling run in parallel. Adaptive projects cycle through Planning, Executing, and Monitoring every iteration. Five gates mark the sponsor decisions: G1 Charter, G2 Baseline, G3 Mid-delivery, G4 Go-live, and G5 Closure. The PM Methodology Guide (O1) sets what each gate checks; the Governance & Approval Policy (O2) sets who approves.

Foundations: choosing the approach and tailoring

The delivery approach is decided in Stage 0 and confirmed in Stage 1. It shapes every template that follows, so it comes first. The project **life cycle** is the sequence of phases the project moves through. The **development approach** is how the work inside those phases gets done.

DIMENSION	PREDICTIVE	HYBRID	ADAPTIVE
Best fit	Stable, well-understood requirements. Regulated or fixed-price work.	Some parts stable, others uncertain. Most real-world projects.	Evolving or unclear requirements. Frequent customer feedback available.
Planning	Detailed up front. Baselines for scope, schedule, cost.	Baselined milestones and budget; detail planned per iteration where uncertain.	Rolling. Product backlog refined continuously.
Change	Formal change control against baselines.	Formal control on baselined items; backlog reprioritization elsewhere.	Expected. Handled by reprioritizing the backlog.
Value delivered	At the end, or at major phase completions.	Staged: fixed components on schedule, iterative components incrementally.	Every iteration or release.
Success measured by	Scope, schedule, cost, and quality against baseline.	Milestone health plus delivered value.	Value delivered, customer satisfaction, working increments.
Example	Office relocation; regulatory filing; contract-defined client deliverable.	Client portal launch: fixed compliance and data migration, iterative user interface.	New marketing content program; creative campaign testing.

Tailoring drivers

- 01 **Uncertainty and risk.** High uncertainty favors adaptive; low favors predictive.
- 02 **Stakeholder availability.** Frequent access enables iterative reviews. Limited access needs formal gate reviews.
- 03 **Delivery cadence.** Can the customer use partial results, or only the finished product?
- 04 **Culture and governance.** Audit-heavy, hierarchical environments lean predictive.
- 05 **Compliance and contract terms.** Fixed-price and regulated work need baselines and documented approvals.

Complexity check (Stacey model)

ZONE	SIGNAL	FIT
Simple	Clear requirements, known solution	Predictive
Complicated	Knowable with expert analysis	Predictive or hybrid
Complex	Answer emerges only by trying	Adaptive

ZONE	SIGNAL	FIT
Chaotic	No agreement, no certainty	Stabilize first, then reassess

Captured in template 08, Approach Selection & Tailoring Worksheet.

0 PRE-PROJECT Business Justification

PURPOSE Confirm the work is worth doing before anyone commits people or money.	TRIGGERED BY A request, client ask, problem, opportunity, or strategic directive.	ACCOUNTABLE Sponsor. The PM or a business analyst often prepares the materials.
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Steps

- 01 **Capture the request** through a standard intake so every idea is assessed the same way.
- 02 **Assess the need.** Define the current state, desired state, the gap, who benefits, and what success looks like.
- 03 **Scan the environment.** Note organizational conditions you must work within (culture, structure, regulation, market) and assets you can use (templates, past project records). Run PESTLE or SWOT for larger initiatives.
- 04 **Identify options**, including doing nothing and build versus buy.
- 05 **Produce rough estimates** of cost, time, and people for each option, using past project data (O5) where it exists. Label them as rough.
- 06 **Build the business case.** Add a feasibility study and cost-benefit analysis where the investment or uncertainty is significant.
- 07 **Define the benefits**, how each will be measured, and name the benefits owner.
- 08 **Assess complexity** and recommend a delivery approach.
- 09 **Decision gate:** approve and charter, defer, or reject.

Documents produced

- 01 **Project Request & Intake Form**

ALL STANDARD DOC
- 02 **Needs Assessment**

ALL STANDARD DOC
- 03 **Environmental & Strategic Analysis**

ALL SITUATIONAL DOC
- 04 **Feasibility Study**

ALL SITUATIONAL DOC
- 05 **Business Case**

ALL STANDARD DOC
- 06 **Cost-Benefit Analysis**

ALL SITUATIONAL SHEET
- 07 **Benefits Management Plan**

ALL STANDARD DOC
- 08 **Approach Selection & Tailoring Worksheet**

ALL STANDARD DOC

PREDICTIVE Full business case with detailed option analysis and a funded total budget.	HYBRID One business case for the whole initiative. Adaptive components funded in tranches tied to results.	ADAPTIVE Lean business case or product vision. States the hypothesis, the minimum viable product, and how value will be tested.
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WATCH FOR

- No named benefits owner. Nobody measures value after the team disbands.
- Rough estimates quoted later as commitments. Record the accuracy range next to every early number.
- Confidentiality, privacy, or regulatory requirements found late. In legal and client-facing work, check these here.

EXIT DECISION Business case approved, funding source identified, benefits owner named, approach recommended.

1

FOCUS AREA

Initiating

PURPOSE

Formally authorize the project and align everyone on why, what, and who.

TRIGGERED BY

Approved business case or a sponsor's decision to proceed.

ACCOUNTABLE

Sponsor signs. PM drafts and leads.

Steps

- 01 **Draft the project charter:** purpose, measurable objectives, high-level scope and exclusions, key milestones, summary budget, success criteria, major risks, and the PM's authority.
- 02 **Log assumptions and constraints** with an owner and a date to validate each one.
- 03 **Identify stakeholders** and assess their interest, influence, and current support.
- 04 **Confirm compliance requirements** (legal, regulatory, contractual, policy) and record each with an owner.
- 05 **Set governance:** who decides what, escalation paths, and the tolerances that trigger escalation.
- 06 **Confirm the delivery approach** and record tailoring decisions.
- 07 **Obtain the sponsor's signature** on the charter.
- 08 **Form the core team** and agree a team charter: norms, meeting cadence, decision method, and how conflict is handled.
- 09 **Hold the kickoff** with the team and key stakeholders.

Documents produced

- 09 **Project Charter**
ALL **ESSENTIAL** **DOC**
- 10 **Assumption & Constraint Log**
ALL **STANDARD** **SHEET**
- 11 **Stakeholder Register**
ALL **ESSENTIAL** **SHEET**
- 12 **Governance, Roles & Escalation Model**
ALL **STANDARD** **DOC**
- 13 **Compliance Register**
ALL **STANDARD** **SHEET**
- 14 **Kickoff Deck & Agenda**
ALL **ESSENTIAL** **SLIDES**
- 15 **Team Charter & Working Agreement**
ALL **STANDARD** **DOC**
- 87 **Project Team Roles & Hierarchy Guide**
ALL **STANDARD** **DOC**
- 88 **Organizational Structures Guide**
ALL **STANDARD** **DOC**

PREDICTIVE

Full charter with milestone dates and budget. Formal sponsor sign-off.

HYBRID

Charter states which workstreams run predictively and which iterate, and how they connect.

ADAPTIVE

Short charter plus product vision. Product owner named. Team agrees its Definition of Done.

WATCH FOR

- An unsigned charter. Without it, the PM has no formal authority over resources.
- Objectives that cannot be measured. Vague objectives are where scope creep starts.
- A missing decision-maker. If the person who can say no isn't identified now, they appear at the end.

EXIT GATE · **G1 CHARTER** Charter signed, stakeholders identified, governance agreed, kickoff held.

2 FOCUS AREA Planning

PURPOSE

Define how the work will be done, measured, and controlled.

TRIGGERED BY

Signed charter. Repeats at each iteration or rolling wave.

ACCOUNTABLE

PM, with the team, product owner, and subject matter experts.

Steps

- 01 **Write the management plans first** for scope, requirements, schedule, cost, quality, resources, communications, risk, procurement, change, and configuration. They set the rules the detailed planning follows.
- 02 **Elicit and document requirements** (business, stakeholder, solution, transition). Set up traceability back to objectives.
- 03 **Define scope:** scope statement and WBS for predictive work; product vision, roadmap, personas, story map, and product backlog for adaptive work. Agree how the team sizes and prioritizes work.
- 04 **Build the schedule:** activities, dependencies, durations, milestones, and critical path; or a release plan and iteration cadence. Teams in continuous flow set up a Kanban board with WIP limits instead.
- 05 **Plan resources:** roles, skills, RACI, how people are acquired, and availability calendars.
- 06 **Estimate costs and set the budget**, including contingency reserve for known risks and management reserve for unknowns.
- 07 **Plan quality:** standards, metrics, reviews and testing, acceptance criteria, Definition of Done.
- 08 **Plan communications:** who needs what, in what format, how often, from whom.
- 09 **Plan risk:** set appetite and scoring, identify risks, analyze, and assign responses and owners.
- 10 **Plan procurement** if vendors are involved: make or buy, contract type, statement of work, selection criteria.
- 11 **Set change control:** what counts as a change, who approves at which threshold, and how baselines are updated.
- 12 **Plan organizational change and adoption:** who is affected, readiness, training, and reinforcement.
- 13 **Plan the transition now**, not at the end: receiving owner, cutover, support model.
- 14 **Integrate into the Project Management Plan**, set baselines, and obtain approval.

Documents produced

- 16 **Project Management Plan**
ALL ESSENTIAL DOC
- 17 **Scope Management Plan**
ALL STANDARD DOC
- 18 **Requirements Management Plan**
ALL STANDARD DOC
- 19 **Requirements Documentation**
ALL STANDARD DOC
- 20 **Requirements Traceability Matrix**
ALL STANDARD SHEET
- 21 **Project Scope Statement**
P/H STANDARD DOC
- 22 **WBS & WBS Dictionary**
P/H STANDARD SHEET
- 23 **Product Vision & Roadmap**
A/H STANDARD SLIDES
- 24 **Story Map**
A/H SITUATIONAL SHEET
- 25 **Product Backlog & User Story Template**
A/H STANDARD SHEET
- 26 **Release Plan**
A/H STANDARD SHEET
- 27 **Schedule Management Plan**
ALL STANDARD DOC
- 28 **Project Schedule**
P/H STANDARD SHEET
- 29 **Milestone List**
ALL ESSENTIAL SHEET
- 30 **Financial (Cost) Management Plan**
ALL STANDARD DOC
- 31 **Cost Estimate & Budget Workbook**
ALL STANDARD SHEET
- 32 **Quality Management Plan**
ALL STANDARD DOC

33	Resource Management Plan	ALL	STANDARD	DOC
34	Resource Calendar & Capacity Plan	ALL	STANDARD	SHEET
35	RACI Matrix	ALL	ESSENTIAL	SHEET
36	Rewards & Recognition Plan	ALL	SITUATIONAL	DOC
37	Team Development & Training Plan	ALL	SITUATIONAL	DOC
38	Stakeholder Engagement Plan	ALL	STANDARD	DOC
39	Stakeholder Engagement Assessment Matrix	ALL	STANDARD	SHEET
40	Communications Management Plan	ALL	STANDARD	DOC
41	Communications Matrix	ALL	ESSENTIAL	SHEET
42	Risk Management Plan	ALL	STANDARD	DOC
43	Risk Register	ALL	ESSENTIAL	SHEET
44	Procurement Management Plan	ALL	SITUATIONAL	DOC
45	Statement of Work	ALL	SITUATIONAL	DOC
46	Solicitation Documents (RFI, RFQ, RFP)	ALL	SITUATIONAL	DOC
47	Vendor Selection Scorecard	ALL	SITUATIONAL	SHEET
48	Change Management Plan	ALL	STANDARD	DOC
49	Configuration Management Plan	ALL	SITUATIONAL	DOC
50	Change Readiness & Culture Assessment	ALL	SITUATIONAL	DOC
51	Organizational Change & Adoption Plan	ALL	STANDARD	DOC
52	Transition & Rollout Plan	ALL	STANDARD	DOC
82	Kanban Board & Flow Policy	A/H	STANDARD	DOC

83 Agile Estimation & Prioritization Guide

A/H STANDARD DOC

84 Agile Metrics Tracker

A/H STANDARD SHEET

85 User Persona

A/H SITUATIONAL DOC

86 MVP & Experiment Canvas

A/H SITUATIONAL DOC

89 Contract Types Guide

ALL STANDARD DOC

PREDICTIVE	HYBRID	ADAPTIVE
Full plan and baselines approved before execution. WBS decomposed to work packages.	Baseline milestones, budget, and fixed components. Plan adaptive workstreams in detail one iteration at a time.	Roadmap and backlog ready; first iteration plannable. Detailed planning repeats every iteration.

WATCH FOR

- Resource plans built on assumed availability. Get each functional manager to confirm in writing.
- Cross-department dependencies left off the schedule. These are the most common source of slippage.
- Over-planning low-risk work while under-planning compliance and handover.
- Adoption treated as "training at the end." Change support has to be planned alongside delivery.

EXIT GATE · G2 BASELINE

Project Management Plan approved and baselines set (predictive), or backlog ready and first iteration planned (adaptive).

3

FOCUS AREA Executing

PURPOSE

Do the work, lead the team, engage stakeholders, and deliver value.

TRIGGERED BY

Approved plan, or the start of each iteration.

ACCOUNTABLE

PM leads; team delivers; product owner accepts adaptive work.

Steps

- 01 **Acquire and onboard** team members and vendors.
- 02 **Direct the work** to plan, or run iterations: planning, daily sync, review, retrospective.
- 03 **Engage stakeholders** and communicate according to the plan.
- 04 **Manage quality:** follow the agreed process, run checks, run user acceptance testing.
- 05 **Carry out risk responses;** log and resolve issues and impediments quickly.
- 06 **Manage vendors and contracts** against agreed deliverables and service levels.
- 07 **Record decisions and knowledge** as you go, so nothing depends on one person's memory.
- 08 **Lead the team:** resolve conflict, remove obstacles, develop skills, recognize contributions.
- 09 **Deliver increments** and obtain partial acceptance as each one is reviewed. Test risky assumptions with a minimum viable product before scaling up.
- 10 **Carry out change and adoption activities:** communication, training, early wins, support.

Documents produced

- 53 **Team Onboarding Plan**
ALL STANDARD DOC
- 54 **Meeting Agenda & Minutes**
ALL ESSENTIAL DOC
- 55 **Decision & Action Log**
ALL ESSENTIAL SHEET
- 56 **Issue & Impediment Log**
ALL ESSENTIAL SHEET
- 57 **Iteration Plan & Review**
A/H STANDARD DOC
- 58 **Test & UAT Plan**
ALL STANDARD DOC
- 59 **Quality Control Checklist**
ALL STANDARD DOC
- 60 **Vendor Performance Scorecard**
ALL SITUATIONAL SHEET
- 61 **Knowledge Transfer Plan**
ALL SITUATIONAL DOC

PREDICTIVE

Work assigned per schedule. Deliverables reviewed at milestones.

HYBRID

Milestone schedule sets the frame; day-to-day work runs on an iterative task board.

ADAPTIVE

Team pulls work from the backlog. Limits on work in progress keep flow steady.

WATCH FOR

- Decisions made in meetings and never written down. Log every decision with who made it and why.
- Impediments sitting more than a day or two. Escalate early; idle time costs more than an awkward conversation.
- Key-person dependency. If one person holds critical knowledge, document it or cross-train now.

ONGOING CHECK Each deliverable accepted against its acceptance criteria or Definition of Done. **G3 Mid-delivery** is held where the project names one (often a security or design review).

4

FOCUS AREA · RUNS ALONGSIDE EXECUTING

Monitoring & Controlling

PURPOSE

Measure performance against plan, report honestly, and correct course early.

TRIGGERED BY

Continuous from the first day of execution.

ACCOUNTABLE

PM. Change decisions rest with the authority set in governance.

Steps

- 01 **Collect performance data:** actual cost and progress, or velocity, throughput, and cycle time in the agile metrics tracker.
- 02 **Compare to baselines and targets.** Use variance and trend analysis; use earned value where the project tracks it.
- 03 **Report status** to each audience at the agreed cadence, including what decisions you need from them.
- 04 **Monitor risks:** review the register, watch triggers, track reserve use, add new risks.
- 05 **Control change:** request, assess impact, decide, update baselines and logs, communicate.
- 06 **Control scope, schedule, cost, and quality** against the plan.
- 07 **Escalate exceptions** when a tolerance is breached, with a recovery recommendation.
- 08 **Hold phase-gate reviews** or iteration reviews to confirm readiness to proceed.
- 09 **Capture lessons continuously** through retrospectives and the lessons learned register.
- 10 **Check stakeholder engagement and satisfaction** and adjust the approach where it is slipping.

Documents produced

- 62 **Status Report**
ALL ESSENTIAL DOC
- 63 **Executive Performance Dashboard**
ALL STANDARD SHEET
- 64 **Risk Report**
ALL STANDARD DOC
- 65 **Change Request Form**
ALL ESSENTIAL DOC
- 66 **Change Log**
ALL ESSENTIAL SHEET
- 67 **Exception Report & Recovery Plan**
ALL STANDARD DOC
- 68 **Root Cause Analysis Worksheet**
ALL SITUATIONAL DOC
- 69 **Phase-Gate Review Checklist**
P/H STANDARD DOC
- 70 **Customer Satisfaction Survey**
ALL STANDARD DOC
- 71 **Compliance Audit Checklist**
ALL STANDARD DOC
- 72 **Retrospective Template**
ALL STANDARD DOC
- 73 **Lessons Learned Register**
ALL ESSENTIAL SHEET
- 74 **Team Performance Assessment**
ALL SITUATIONAL DOC

PREDICTIVE

Earned value, variance thresholds, and a change control board for baseline changes.

HYBRID

One dashboard combining milestone health with iteration metrics. Formal change control only for baselined items.

ADAPTIVE

Burnup or burndown charts, velocity, and flow metrics. Changes handled by reprioritizing the backlog.

WATCH FOR

- "Watermelon" reporting: green on the outside, red inside. Report the real status and the decision needed.
- Informal changes approved "just this once." Every change to a baseline goes through the log.
- Reporting without a request. Every status report should end with what you need and by when.

ONGOING CHECK Variances inside tolerance or escalated; change log current; risks reviewed at the agreed cadence. **G4 Go-live**

: readiness recorded (template 76) and the go/no-go decision made before cutover.

5

FOCUS AREA · PROJECT OR PHASE

Closing

PURPOSE	TRIGGERED BY	ACCOUNTABLE
Confirm the work is accepted, hand it over cleanly, and close every open thread.	Work complete, phase end, release boundary, or early termination.	PM. Sponsor and customer sign acceptance.

Steps

- 01 **Verify every deliverable** against requirements using the traceability matrix and acceptance criteria.
- 02 **Resolve or formally disposition open items** before asking for sign-off. Never close on a promise to fix later.
- 03 **Obtain formal acceptance** in writing.
- 04 **Confirm transition readiness** with end users, the receiving organization, the project team, and support staff. Hand over, with a hypercare period if used.
- 05 **Close procurements:** final deliverables, invoices, claims, and contract closure.
- 06 **Close finances and administration:** final costs, accounts closed, final report prepared.
- 07 **Run the close-out lessons learned session**, add the lessons to the organization's repository (O4), and update templates and records.
- 08 **Release the team and resources**, with recognition and feedback to their managers.
- 09 **Archive project records** following the records standard (O3), and add planned vs. actual results to the historical data (O5).
- 10 **Communicate closure** to all stakeholders.

Documents produced

- 75 **Deliverable Acceptance & Sign-off Form**

ALL ESSENTIAL DOC
- 76 **Transition Readiness Checklist**

ALL STANDARD DOC
- 77 **Project Closure Checklist**

ALL ESSENTIAL DOC
- 78 **Final Project Report**

ALL STANDARD DOC
- 79 **Close-Out Lessons Learned Report**

ALL STANDARD DOC

PREDICTIVE	HYBRID	ADAPTIVE
One formal closeout at the end of the project or each phase.	Releases accepted incrementally; formal closeout for the project, often after a hypercare period.	Closure happens at each release boundary. Final closure when the product owner and sponsor end funding.

WATCH FOR

- Early termination treated as "just stop." A cancelled project needs the same closure steps, plus a documented reason.
- Handover to a team that isn't ready. Readiness is confirmed with the receiving side, not assumed by the project team.
- Lessons learned held but never applied. Each lesson should change a template, checklist, or practice.

EXIT GATE · G5 CLOSURE Acceptance signed, transition complete, contracts and finances closed, records archived, closure communicated.

6

POST-PROJECT

Benefits Realization

PURPOSE Confirm the project delivered the value it was approved for, and sustain it.	TRIGGERED BY Project close. Benefits may appear immediately or over months.	ACCOUNTABLE Benefits owner, reporting to the sponsor.
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Steps

- 01 **Confirm the benefits owner** has formally accepted responsibility at handover.
- 02 **Measure benefits** against the baseline at the intervals set in the Benefits Management Plan.
- 03 **Report results** to the sponsor or portfolio leadership.
- 04 **Hold a post-implementation review** once benefits have had time to appear (commonly three to six months after go-live).
- 05 **Route improvements:** small ones to the product backlog or operations, larger ones to a new project request.
- 06 **Feed results back** into future business cases and estimates.

Documents produced

80	Benefits Realization Tracker ALL STANDARD SHEET
81	Benefits Realization Report & Post-Implementation Review ALL STANDARD DOC

PREDICTIVE Operations or the business owner sustains benefits. Future improvements become new projects.	HYBRID Operations sustains, supported through hypercare. Minor updates go to a backlog; major ones become projects.	ADAPTIVE Product owner and team continue measuring value. Improvements go straight into the product backlog.
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WATCH FOR - No baseline measured before go-live. Without it, the benefit can't be proven. - Benefits reported once and then dropped. Set the measurement schedule in the plan and put it on calendars.

Cross-cutting threads

These run through every stage rather than living in one. Each has a home template and a cadence.

THREAD	STARTS	HOME TEMPLATES	TYPICAL CADENCE
Governance & decisions	Stage 1	12, 55, 69, O1, O2	Steering review monthly or at gates; decisions logged same day
Stakeholder engagement	Stage 1	11, 38, 39	Register reviewed monthly; engagement checked at each gate
Risk	Stage 0	42, 43, 64	Register reviewed weekly or each iteration
Issues & impediments	Stage 3	56, 68	Daily for blockers; weekly review
Change control	Stage 2	48, 49, 65, 66	As changes arise; change board on a fixed schedule
Quality	Stage 2	32, 58, 59, 75	Each deliverable or iteration
Communication & reporting	Stage 1	40, 41, 62, 63	Weekly team status; biweekly or monthly executive
Organizational change & adoption	Stage 2	50, 51, 76	Milestone-driven; heaviest before and after go-live
Compliance	Stage 0	13, 71	Register reviewed monthly; audits at gates or as required
Benefits & value	Stage 0	07, 80, 81	Defined before approval; measured on the plan's schedule after close
Adaptive delivery & flow	Stage 2	25, 57, 82, 83, 84	Refinement weekly; planning, review, and retrospective each iteration; flow metrics weekly
Lessons learned & improvement	Stage 1	72, 73, 79, O4	Every iteration or milestone; consolidated at close

Master template index

The full build list for the asset library, in lifecycle order. Template numbers stay fixed so file names, references, and this playbook stay in sync. **Type** tells you how the document is governed: **Plan** items are approved and changed only through change control; **Registers** are living logs updated as you go; **Forms** and **Reports** are completed at a point in time; **Guides** are reference documents you read and adapt once per project.

#	TEMPLATE	TYPE	FORMAT	APPROACH	TIER	WHAT IT CAPTURES
0 · Business Justification						
01	Project Request & Intake Form	Form	Doc	ALL	STANDARD	Requester, problem or opportunity, urgency, strategic link, rough size, proposed sponsor
02	Needs Assessment	Report	Doc	ALL	STANDARD	Current vs. desired state, the gap, root causes, who benefits, definition of success
03	Environmental & Strategic Analysis	Form	Doc	ALL	SITUATIONAL	PESTLE, SWOT, TECOP, and VUCA scans, with implications for scope and risk
04	Feasibility Study	Report	Doc	ALL	SITUATIONAL	Technical, economic, operational, legal, and schedule viability of each option
05	Business Case	Report	Doc	ALL	STANDARD	Options including do-nothing and build vs. buy, rough cost and time, benefits, risks, recommendation
06	Cost-Benefit Analysis	Workbook	Sheet	ALL	SITUATIONAL	Costs, benefits, NPV, ROI, benefit-cost ratio, payback, sensitivity
07	Benefits Management Plan	Plan	Doc	ALL	STANDARD	Each benefit, KPI and baseline, target, timing, benefits owner, assumptions
08	Approach Selection & Tailoring Worksheet	Form	Doc	ALL	STANDARD	Complexity assessment, recommended approach, tailoring decisions and reasons
1 · Initiating						
09	Project Charter	Form	Doc	ALL	ESSENTIAL	Purpose and project vision, measurable objectives, scope and exclusions, milestones, budget with reserves, success criteria, key risks, PM authority, sponsor sign-off
10	Assumption & Constraint Log	Register	Sheet	ALL	STANDARD	Each assumption or constraint, owner, validation date, status, linked risk
11	Stakeholder Register	Register	Sheet	ALL	ESSENTIAL	Name, role, interest, influence, expectations, communication needs, engagement level
12	Governance, Roles & Escalation Model	Plan	Doc	ALL	STANDARD	Project org chart, decision rights, steering committee, tolerances, escalation path and response times
13	Compliance Register	Register	Sheet	ALL	STANDARD	Each legal, regulatory, contractual, or policy requirement, owner, evidence, status
14	Kickoff Deck & Agenda	Deck	Slides	ALL	ESSENTIAL	Why, goals, scope, team and roles, ways of working, timeline, risks, next steps

#	TEMPLATE	TYPE	FORMAT	APPROACH	TIER	WHAT IT CAPTURES
15	Team Charter & Working Agreement	Form	Doc	ALL	STANDARD	Norms, meeting cadence, decision method, conflict process, Definition of Ready and Definition of Done
87	Project Team Roles & Hierarchy Guide	Guide	Doc	ALL	STANDARD	Roles by approach, how they relate, and who decides what, before the RACI and stakeholder register are built
88	Organizational Structures Guide	Guide	Doc	ALL	STANDARD	Functional, matrix, and project-oriented structures, PMO types, and what each means for the PM's authority
2 · Planning						
16	Project Management Plan	Plan	Doc	ALL	ESSENTIAL	Integrating document: approach, life cycle, baselines, reserves and performance measurement baseline, links to every subsidiary plan
17	Scope Management Plan	Plan	Doc	ALL	STANDARD	How scope is defined, decomposed, approved, validated, and controlled
18	Requirements Management Plan	Plan	Doc	ALL	STANDARD	Elicitation, prioritization (MoSCoW), traceability, approval and change rules for requirements
19	Requirements Documentation	Register	Doc	ALL	STANDARD	Business, stakeholder, solution, and transition requirements with IDs, source, and priority
20	Requirements Traceability Matrix	Register	Sheet	ALL	STANDARD	Requirement to objective, deliverable, verification method, and acceptance status
21	Project Scope Statement	Plan	Doc	P/H	STANDARD	Detailed scope, deliverables, acceptance criteria, exclusions, constraints, assumptions
22	WBS & WBS Dictionary	Plan	Sheet	P/H	STANDARD	Deliverable hierarchy, work packages, owners, estimates, acceptance criteria
23	Product Vision & Roadmap	Plan	Slides	A/H	STANDARD	Vision statement, themes, outcomes, and the sequence of releases
24	Story Map	Plan	Sheet	A/H	SITUATIONAL	User journey, activities, and stories sliced into releases
25	Product Backlog & User Story Template	Register	Sheet	A/H	STANDARD	Epics, features, user stories, acceptance criteria, Definition of Ready, priority, estimate, status, refinement checklist
26	Release Plan	Plan	Sheet	A/H	STANDARD	Release goals, iterations per release, target dates, capacity, scope by release
27	Schedule Management Plan	Plan	Doc	ALL	STANDARD	Scheduling method, schedule model development, project calendar, tools, accuracy, update cadence, variance thresholds
28	Project Schedule	Plan	Sheet	P/H	STANDARD	Activity list and attributes, dependencies, durations, resources, critical path, Gantt view
29	Milestone List	Register	Sheet	ALL	ESSENTIAL	Each milestone, mandatory or optional, target date, owner, status

#	TEMPLATE	TYPE	FORMAT	APPROACH	TIER	WHAT IT CAPTURES
30	Financial (Cost) Management Plan	Plan	Doc	ALL	STANDARD	Estimating method, units, control thresholds, reserves, reporting, CapEx/OpEx, funding
31	Cost Estimate & Budget Workbook	Workbook	Sheet	ALL	STANDARD	Basis of estimates, cost by work package, contingency, management reserve, time-phased budget
32	Quality Management Plan	Plan	Doc	ALL	STANDARD	Quality policy, standards, metrics, review and test approach, roles, Definition of Done
33	Resource Management Plan	Plan	Doc	ALL	STANDARD	Roles and skills, organizational and resource breakdown structures, acquisition, onboarding, development, release
34	Resource Calendar & Capacity Plan	Workbook	Sheet	ALL	STANDARD	Availability by person and period, allocations, holidays, over-allocation flags
35	RACI Matrix	Register	Sheet	ALL	ESSENTIAL	Deliverables and decisions by role, with exactly one Accountable per row
36	Rewards & Recognition Plan	Plan	Doc	ALL	SITUATIONAL	What is recognized, how, by whom, when, and budget
37	Team Development & Training Plan	Plan	Doc	ALL	SITUATIONAL	Skill gaps, training actions per person, timing, success measures
38	Stakeholder Engagement Plan	Plan	Doc	ALL	STANDARD	Power/interest and salience analysis, engagement strategy per stakeholder group
39	Stakeholder Engagement Assessment Matrix	Register	Sheet	ALL	STANDARD	Current vs. desired engagement level per stakeholder, with gap actions
40	Communications Management Plan	Plan	Doc	ALL	STANDARD	Audiences, information, method, frequency, owner, escalation, confidentiality
41	Communications Matrix	Register	Sheet	ALL	ESSENTIAL	One-page version of the communications plan for smaller projects
42	Risk Management Plan	Plan	Doc	ALL	STANDARD	Method, roles, appetite and thresholds, risk breakdown structure, probability and impact scales
43	Risk Register	Register	Sheet	ALL	ESSENTIAL	Risk statement, cause, probability, impact, score, owner, response, trigger, status
44	Procurement Management Plan	Plan	Doc	ALL	SITUATIONAL	Make-or-buy, contract type, procurement strategy, roles, timeline, selection process
45	Statement of Work	Form	Doc	ALL	SITUATIONAL	Vendor scope, deliverables, acceptance criteria, schedule, reporting, terms; internal project SOW variant
46	Solicitation Documents (RFI, RFQ, RFP)	Form	Doc	ALL	SITUATIONAL	Request structure, requirements, response format, evaluation criteria, timeline
47	Vendor Selection Scorecard	Form	Sheet	ALL	SITUATIONAL	Weighted criteria, scores, references, recommendation

#	TEMPLATE	TYPE	FORMAT	APPROACH	TIER	WHAT IT CAPTURES
48	Change Management Plan	Plan	Doc	ALL	STANDARD	Project change control: what counts as a change, request path, approval levels, change board
49	Configuration Management Plan	Plan	Doc	ALL	SITUATIONAL	Items under version control, naming, versioning, storage, approval of updates
50	Change Readiness & Culture Assessment	Form	Doc	ALL	SITUATIONAL	Culture dimensions, readiness by affected group, resistance risks
51	Organizational Change & Adoption Plan	Plan	Doc	ALL	STANDARD	Affected groups, change actions by Kotter step, training, adoption measures
52	Transition & Rollout Plan	Plan	Doc	ALL	STANDARD	Receiving owner, cutover steps, data migration, support model, hypercare, rollback
82	Kanban Board & Flow Policy	Plan	Doc	A/H	STANDARD	Board columns and done rules, WIP limits, classes of service, pull and blocked-work policies, flow metrics
83	Agile Estimation & Prioritization Guide	Form	Doc	A/H	STANDARD	Relative sizing, planning poker, reference stories, MoSCoW, value vs. effort, Kano, WSJF
84	Agile Metrics Tracker	Register	Sheet	A/H	STANDARD	Velocity, committed vs. completed, burnup and burndown data, flow metrics, release forecast range
85	User Persona	Form	Doc	A/H	SITUATIONAL	Role, context, goals, pain points, behaviors, needs, and how success for them is measured
86	MVP & Experiment Canvas	Form	Doc	A/H	SITUATIONAL	Assumption, hypothesis, minimum viable product, test method, success threshold, persevere / pivot / stop
89	Contract Types Guide	Guide	Doc	ALL	STANDARD	Fixed-price, cost-reimbursable, and time-and-materials contracts compared, a decision guide, and key terms to check
3 · Executing						
53	Team Onboarding Plan	Plan	Doc	ALL	STANDARD	Access, context, tools, first 30 days, buddy, first deliverables
54	Meeting Agenda & Minutes	Form	Doc	ALL	ESSENTIAL	Purpose, agenda with timings, attendees, discussion, decisions, actions
55	Decision & Action Log	Register	Sheet	ALL	ESSENTIAL	Decision, decided by, date, rationale; action, owner, due date, status
56	Issue & Impediment Log	Register	Sheet	ALL	ESSENTIAL	Issue, impact, priority, owner, action, escalation, target date, status
57	Iteration Plan & Review	Form	Doc	A/H	STANDARD	Iteration goal, capacity, Definition of Ready check, committed items, review outcomes, stakeholder feedback
58	Test & UAT Plan	Plan	Doc	ALL	STANDARD	Test scope and cases, entry and exit criteria, defect handling, sign-off

#	TEMPLATE	TYPE	FORMAT	APPROACH	TIER	WHAT IT CAPTURES
59	Quality Control Checklist	Form	Doc	ALL	STANDARD	Checks per deliverable type, pass or fail, reviewer, corrective action
60	Vendor Performance Scorecard	Report	Sheet	ALL	SITUATIONAL	Deliverable and service-level performance, issues, corrective actions
61	Knowledge Transfer Plan	Plan	Doc	ALL	SITUATIONAL	Critical knowledge, holders, transfer method, recipients, completion check
4 · Monitoring & Controlling						
62	Status Report	Report	Doc	ALL	ESSENTIAL	Overall and per-area RAG, accomplishments, next steps, risks, decisions needed
63	Executive Performance Dashboard	Report	Sheet	ALL	STANDARD	KPIs, milestone trend, earned value (predictive) or burnup and velocity (adaptive), top risks
64	Risk Report	Report	Doc	ALL	STANDARD	Overall risk exposure, top risks, trend, reserve status, decisions needed
65	Change Request Form	Form	Doc	ALL	ESSENTIAL	Description, reason, impact on scope, schedule, cost, quality, and risk, options, decision
66	Change Log	Register	Sheet	ALL	ESSENTIAL	Request ID, date, requester, summary, impact, decision, baseline updated
67	Exception Report & Recovery Plan	Report	Doc	ALL	STANDARD	Tolerance breached, root cause, options, recommendation, revised forecast
68	Root Cause Analysis Worksheet	Form	Doc	ALL	SITUATIONAL	Problem statement, 5 Whys, fishbone categories, root cause, corrective action
69	Phase-Gate Review Checklist	Form	Doc	P/H	STANDARD	Exit criteria, evidence, open risks, go / conditional go / no-go decision
70	Customer Satisfaction Survey	Form	Doc	ALL	STANDARD	Ratings and open questions on outcomes, communication, and service
71	Compliance Audit Checklist	Form	Doc	ALL	STANDARD	Requirement, evidence reviewed, finding, corrective action, auditor sign-off
72	Retrospective Template	Form	Doc	ALL	STANDARD	What worked, what didn't, root causes, improvement actions and owners
73	Lessons Learned Register	Register	Sheet	ALL	ESSENTIAL	Lesson, category, impact, recommendation, where it was applied
74	Team Performance Assessment	Form	Doc	ALL	SITUATIONAL	Team effectiveness measures, strengths, gaps, development actions
5 · Closing						
75	Deliverable Acceptance & Sign-off Form	Form	Doc	ALL	ESSENTIAL	Deliverable, criteria met, open items and their disposition, approver signature
76	Transition Readiness Checklist	Form	Doc	ALL	STANDARD	Readiness of end users, receiving organization, project team, and support staff

#	TEMPLATE	TYPE	FORMAT	APPROACH	TIER	WHAT IT CAPTURES
77	Project Closure Checklist	Form	Doc	ALL	ESSENTIAL	Acceptance, procurement closure, finances, records, resources, lessons, communication; early-termination section
78	Final Project Report	Report	Doc	ALL	STANDARD	Objectives vs. results, baseline variances, benefits status, lessons, items handed over
79	Close-Out Lessons Learned Report	Report	Doc	ALL	STANDARD	Consolidated lessons, recommendations, template and process updates
6 · Benefits Realization						
80	Benefits Realization Tracker	Register	Sheet	ALL	STANDARD	Benefit, KPI, baseline, target, actuals by period, owner, status
81	Benefits Realization Report & Post-Implementation Review	Report	Doc	ALL	STANDARD	Benefits achieved vs. plan, adoption, unintended effects, follow-on actions

The Essential kit

The minimum set for any project, including a small internal one. Build these first. Together they cover authorization, stakeholders, ownership, milestones, risk, communication, decisions, issues, change, reporting, acceptance, and closure.

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| 09 | Project Charter | <div>ALL</div> <div>ESSENTIAL</div> <div>DOC</div> |
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| 11 | Stakeholder Register | <div>ALL</div> <div>ESSENTIAL</div> <div>SHEET</div> |
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| 14 | Kickoff Deck & Agenda | <div>ALL</div> <div>ESSENTIAL</div> <div>SLIDES</div> |
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| 16 | Project Management Plan | <div>ALL</div> <div>ESSENTIAL</div> <div>DOC</div> |
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| 29 | Milestone List | <div>ALL</div> <div>ESSENTIAL</div> <div>SHEET</div> |
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| 35 | RACI Matrix | <div>ALL</div> <div>ESSENTIAL</div> <div>SHEET</div> |
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| 41 | Communications Matrix | <div>ALL</div> <div>ESSENTIAL</div> <div>SHEET</div> |
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| 43 | Risk Register | <div>ALL</div> <div>ESSENTIAL</div> <div>SHEET</div> |
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| 54 | Meeting Agenda & Minutes | <div>ALL</div> <div>ESSENTIAL</div> <div>DOC</div> |
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| 55 | Decision & Action Log | <div>ALL</div> <div>ESSENTIAL</div> <div>SHEET</div> |
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| 56 | Issue & Impediment Log | <div>ALL</div> <div>ESSENTIAL</div> <div>SHEET</div> |
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| 62 | Status Report | <div>ALL</div> <div>ESSENTIAL</div> <div>DOC</div> |
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| 65 | Change Request Form | <div>ALL</div> <div>ESSENTIAL</div> <div>DOC</div> |
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| 66 | Change Log | <div>ALL</div> <div>ESSENTIAL</div> <div>SHEET</div> |
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| 73 | Lessons Learned Register | <div>ALL</div> <div>ESSENTIAL</div> <div>SHEET</div> |
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| 75 | Deliverable Acceptance & Sign-off Form | <div>ALL</div> <div>ESSENTIAL</div> <div>DOC</div> |
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| 77 | Project Closure Checklist | <div>ALL</div> <div>ESSENTIAL</div> <div>DOC</div> |
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Organizational process assets

The templates above are used project by project. These six assets sit one level up: the standards, records, and knowledge every project draws on and feeds back into. Where an employer already has a policy (quality, procurement, financial controls), these reference it rather than replace it. A printable index of all 95 items, with layout and Excel flags, ships with the library as **00_PM-Asset-Library-Index**.

#	ASSET	TIER	WHAT IT HOLDS	FED BY
01	PM Methodology Guide	STANDARD	The standard way projects run: stages, gates, approach rules, which templates each project size needs	Playbook, all templates
02	Governance & Approval Policy	SITUATIONAL	Project classes, default approval thresholds, gate rules, escalation and reporting standards	12
03	Document Control & Project Records Standard	STANDARD	Folder structure, naming, versioning, access, confidentiality, retention and archiving	49, 77
04	Lessons Learned Repository	STANDARD	Lessons from every project in one searchable register, with where each was applied	73, 79
05	Historical Project Data & Benchmarks	SITUATIONAL	Planned vs. actual duration, cost, and effort from past projects, plus benchmark rates for estimating	78, 84
06	PM Glossary	STANDARD	One plain-language definition per term used in the library, with its source	All templates

Frameworks & formulas

Plan components vs. project documents

- **Project Management Plan:** subsidiary plans plus the scope, schedule, and cost baselines. Approved; changed only through change control.
- **Project documents:** registers, logs, and reports (risk register, issue log, RTM, lessons learned). Updated routinely without change control.

Estimate accuracy

- **Rough order of magnitude** (Stage 0): –25% to +75%
- **Definitive** (Stage 2, bottom-up): –5% to +10%
- **Three-point (PERT):** $E = (O + 4M + P) \div 6$; $\sigma = (P - O) \div 6$

Ranges as commonly cited from the PMBOK® Guide, 6th Ed. Your organization may set its own.

Investment measures

- **ROI = (Benefits – Costs) ÷ Costs × 100**
- **BCR = Benefits ÷ Costs** (above 1.0 is favorable)
- **NPV:** discounted future cash flows minus the investment. Positive adds value.
- **IRR:** the discount rate at which NPV is zero. Higher is better.
- **Payback period:** investment ÷ annual net cash inflow.

Acceptance criteria vs. Definition of Done

- **Acceptance criteria:** conditions specific to one deliverable or story that the customer checks.
- **Definition of Done:** the team's shared checklist that applies to every item (reviewed, tested, documented).
- Both are required. An item is complete only when it meets its own criteria *and* the Definition of Done.

Reserves

- **Contingency reserve:** for identified risks. Inside the cost baseline. Managed by the PM.
- **Management reserve:** for unforeseen work. Outside the baseline, inside the total budget. Released by the sponsor through a change request.
- **Total budget = Cost baseline + Management reserve**

Earned value

- **CV = EV – AC** · **SV = EV – PV**
- **CPI = EV ÷ AC** · **SPI = EV ÷ PV** (below 1.0 is unfavorable)
- **EAC = BAC ÷ CPI** when current performance continues
- **EAC = AC + (BAC – EV)** when the variance was a one-off
- **EAC = AC + bottom-up ETC** when the original plan is no longer valid
- **EAC = AC + (BAC – EV) ÷ (CPI × SPI)** when cost and schedule both drive the rest
- **ETC = EAC – AC** · **VAC = BAC – EAC**
- **TCPI = (BAC – EV) ÷ (BAC – AC)**; above 1.0 means the remaining work must be more efficient

Adaptive metrics

- **Velocity:** work completed per iteration; used for forecasting, never for comparing teams.
- **Burnup:** completed work against total scope; shows scope growth clearly.
- **Burndown:** remaining work over the iteration or release.
- **Cycle time, lead time, throughput, WIP:** flow measures for Kanban-style work.
- **Cost per point = team cost per period ÷ points completed**

RACI rules

- **Responsible** does the work; several people allowed.
- **Accountable** owns the outcome and signs off; exactly one per row.
- **Consulted** gives input before the work is done (two-way).
- **Informed** is told the result (one-way).

Environmental scans

- **Enterprise environmental factors:** conditions you work within (culture, structure, regulation, market).
- **Organizational process assets:** tools you use and improve (templates, policies, past project records). This library is one.
- **PESTLE:** political, economic, social, technological, legal, environmental.
- **TECOP:** technical, environmental, commercial, operational, political. Useful as a risk prompt list.
- **SWOT:** internal strengths and weaknesses, external opportunities and threats.

Terms in common industry use but not defined by PMI are used here as practice, not as PMBOK® terminology: hypercare, Definition of Ready, post-implementation review, "watermelon" reporting.

Kotter's 8 steps for leading change

1. Create a sense of urgency
2. Build a guiding coalition
3. Form a strategic vision
4. Communicate the vision
5. Enable action by removing obstacles
6. Generate short-term wins
7. Sustain acceleration; don't declare victory early
8. Anchor the change in the culture

Steps 1–3 create the climate, 4–6 engage the organization, 7–8 sustain the change. Applied in template 51.