

Template *Roadmap*

Which templates to use, in what order, and for which approach. Use this page to build your kit, then open the Library Index and each template for the details.

USE WHEN	COVERS	APPROACH	COMPANION	VERSION
Starting a project, or choosing what to use next	89 templates · 6 organizational assets	Predictive · Hybrid · Adaptive	Library Index · Project Lifecycle Playbook	v1.0 · October 2026

BUILD YOUR KIT IN FOUR STEPS

1. **Size the project.** Classify it Small, Medium, or Large with O2. O1 section 7 shows what each size requires.
2. **Choose the approach** with T08: predictive, hybrid, or adaptive.
3. **Start with the Essential 17.** Every project uses them, whatever its size or approach.
4. **Add the rest in the order below.** Use rows with a dot in your approach column. Situational rows only when their trigger applies.

● or –	Use with this approach · not used with this approach
Tier	Essential: every project · Standard: most projects · Situational: only when a trigger applies (a vendor, a new team, client data)
Files	PDF: fillable form · PDF + Excel: the workbook does the math; the PDF holds the summary and sign-off
Keep updated	Start it at that step, then update it until the project closes

ESSENTIAL KIT · EVERY PROJECT (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

1 Which templates fit which approach

ALL APPROACHES · 75 TEMPLATES + O1 TO O6 Every template not named on the right. Where an approach changes the content, the template has a labeled section for it.	PREDICTIVE ONLY · 4 T21 Project Scope Statement · T22 WBS & WBS Dictionary · T28 Project Schedule · T69 Phase-Gate Review Checklist	ADAPTIVE ONLY · 10 T23 Product Vision & Roadmap · T85 User Persona · T24 Story Map · T25 Product Backlog & User Story Template · T26 Release Plan · T82 Kanban Board & Flow Policy · T83 Agile Estimation & Prioritization Guide · T84 Agile Metrics Tracker · T86 MVP & Experiment Canvas · T57 Iteration Plan & Review
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Hybrid projects can use all 89. Use the predictive-only templates for the planned workstreams and the adaptive-only templates for the iterative ones, as T08 sets out. Example: a client portal built in sprints (adaptive), with contracts and data migration run to a fixed plan (predictive).

2 Order of use

#	TEMPLATE	WHEN YOU USE IT	FILES	TIER	PREDICTIVE	HYBRID	ADAPTIVE
Before any project · organizational assets · Set up once; every project uses them							
O1	PM Methodology Guide	Read before your first project. Its template map (section 7) shows what each project size requires	PDF	Standard	●	●	●
O2	Governance & Approval Policy	Classify the project Small, Medium, or Large and check who approves what	PDF	Situational	●	●	●
O3	Document Control & Project Records Standard	Set up folders and file names before the first document is saved	PDF	Standard	●	●	●
O4	Lessons Learned Repository	Search past lessons before the charter and plan; add new lessons at close (T79)	PDF	Standard	●	●	●
O5	Historical Project Data & Benchmarks	Check estimates against past results in Stage 0 and Stage 2; add actuals at close	PDF + Excel	Situational	●	●	●
O6	PM Glossary	Look up any term, any time	PDF + Excel	Standard	●	●	●
Stage 0 · Business Justification · Exit: intake decision to charter, defer, or reject							
T01	Project Request & Intake Form	Every new request, before any other work	PDF	Standard	●	●	●
T02	Needs Assessment	After intake, to confirm the problem and the gap	PDF	Standard	●	●	●
T03	Environmental & Strategic Analysis	When outside or internal conditions shape the decision	PDF	Situational	●	●	●
T04	Feasibility Study	When the options are new, risky, or unproven	PDF	Situational	●	●	●

#	TEMPLATE	WHEN YOU USE IT	FILES	TIER	PREDICTIVE	HYBRID	ADAPTIVE
T06	Cost-Benefit Analysis	When the investment needs NPV, ROI, or payback figures	PDF + Excel	Situational	●	●	●
T05	Business Case	To request the decision; pulls in T02, T03, T04, and T06	PDF	Standard	●	●	●
T07	Benefits Management Plan	With the business case; names the benefits owner	PDF	Standard	●	●	●
T08	Approach Selection & Tailoring Worksheet	Before the charter: choose predictive, hybrid, or adaptive	PDF	Standard	●	●	●
Stage 1 · Initiating · Exit: G1 Charter							
T09	Project Charter	Draft first; the sponsor signs it at G1	PDF	Essential	●	●	●
T10	Assumption & Constraint Log	As the charter draft names assumptions · keep updated	PDF	Standard	●	●	●
T11	Stakeholder Register	Right after the charter draft · keep updated	PDF	Essential	●	●	●
T13	Compliance Register	When legal, contract, or data rules apply · keep updated	PDF	Standard	●	●	●
T12	Governance, Roles & Escalation Model	Before kickoff: decision rights, tolerances, and escalation	PDF	Standard	●	●	●
T87	Project Team Roles & Hierarchy Guide	Reference while you set roles and decision rights	PDF	Standard	●	●	●
T88	Organizational Structures Guide	Reference to see how much authority the PM holds here	PDF	Standard	●	●	●
T15	Team Charter & Working Agreement	With the core team, before the work starts	PDF	Standard	●	●	●
T14	Kickoff Deck & Agenda	Last step: launch with the team and key stakeholders	PDF	Essential	●	●	●
Stage 2 · Planning · Exit: G2 Baseline (predictive) or first iteration ready (adaptive)							
INTEGRATE							
T16	Project Management Plan	Start it first as the outline; approve and baseline it last, at G2	PDF	Essential	●	●	●
SCOPE AND REQUIREMENTS							
T17	Scope Management Plan	Set how scope is defined, accepted, and controlled	PDF	Standard	●	●	●
T18	Requirements Management Plan	Set how requirements are gathered, traced, and changed	PDF	Standard	●	●	●
T19	Requirements Documentation	Elicit and record the requirements	PDF	Standard	●	●	●
T20	Requirements Traceability Matrix	As requirements are approved · keep updated to closure	PDF	Standard	●	●	●
T21	Project Scope Statement	Predictive work: describe scope, deliverables, and exclusions	PDF	Standard	●	●	–
T22	WBS & WBS Dictionary	Predictive work: break the scope into work packages	PDF	Standard	●	●	–
T23	Product Vision & Roadmap	Adaptive work: set the product vision, outcomes, and roadmap	PDF	Standard	–	●	●
T85	User Persona	Adaptive work: describe the people the product serves	PDF	Situational	–	●	●
T24	Story Map	Adaptive work: map the user journey and slice releases	PDF	Situational	–	●	●

#	TEMPLATE	WHEN YOU USE IT	FILES	TIER	PREDICTIVE	HYBRID	ADAPTIVE
T25	Product Backlog & User Story Template	Adaptive work: write stories · reorder every iteration	PDF	Standard	–	●	●
SCHEDULE							
T27	Schedule Management Plan	Set how the schedule is built, baselined, and tracked	PDF	Standard	●	●	●
T28	Project Schedule	Predictive work: sequence the WBS activities and build the Gantt	PDF	Standard	●	●	–
T26	Release Plan	Adaptive work: plan releases from the backlog and velocity	PDF	Standard	–	●	●
T29	Milestone List	List the key milestones · update the forecast weekly	PDF	Essential	●	●	●
PEOPLE							
T33	Resource Management Plan	Plan how people are found, assigned, and released	PDF	Standard	●	●	●
T34	Resource Calendar & Capacity Plan	Compare demand with capacity week by week	PDF + Excel	Standard	●	●	●
T35	RACI Matrix	Assign one accountable person for every deliverable	PDF	Essential	●	●	●
T36	Rewards & Recognition Plan	When the project is long or the team needs a lift	PDF	Situational	●	●	●
T37	Team Development & Training Plan	When the team has a skill gap to close	PDF	Situational	●	●	●
COST AND QUALITY							
T30	Financial (Cost) Management Plan	Set cost methods, reserves, and thresholds	PDF	Standard	●	●	●
T31	Cost Estimate & Budget Workbook	Estimate and roll up the budget; check rates against O5	PDF + Excel	Standard	●	●	●
T32	Quality Management Plan	Set quality standards, reviews, and the Definition of Done	PDF	Standard	●	●	●
STAKEHOLDERS AND COMMUNICATION							
T38	Stakeholder Engagement Plan	Plan how each stakeholder group is engaged	PDF	Standard	●	●	●
T39	Stakeholder Engagement Assessment Matrix	Compare current and desired engagement · recheck monthly	PDF	Standard	●	●	●
T40	Communications Management Plan	Set communication rules on larger projects	PDF	Standard	●	●	●
T41	Communications Matrix	List every recurring message on one page	PDF	Essential	●	●	●
RISK							
T42	Risk Management Plan	Set the risk scales, appetite, and response rules	PDF	Standard	●	●	●
T43	Risk Register	Log and score risks · review every week	PDF	Essential	●	●	●
VENDORS (ONLY WHEN YOU BUY WORK OR PRODUCTS)							
T44	Procurement Management Plan	Decide what to buy and how	PDF	Situational	●	●	●
T89	Contract Types Guide	Choose the contract type and check the key terms	PDF	Standard	●	●	●
T45	Statement of Work	Define the work the vendor will deliver	PDF	Situational	●	●	●

#	TEMPLATE	WHEN YOU USE IT	FILES	TIER	PREDICTIVE	HYBRID	ADAPTIVE
T46	Solicitation Documents (RFI, RFQ, RFP)	Ask vendors for information, quotes, or proposals	PDF	Situational	●	●	●
T47	Vendor Selection Scorecard	Score the bids and record the choice	PDF + Excel	Situational	●	●	●
CHANGE, ADOPTION, AND TRANSITION							
T48	Change Management Plan	Set what counts as a change and who approves it	PDF	Standard	●	●	●
T49	Configuration Management Plan	When versions of deliverables need formal control	PDF	Situational	●	●	●
T50	Change Readiness & Culture Assessment	When the change is large or the culture resists change	PDF	Situational	●	●	●
T51	Organizational Change & Adoption Plan	Plan how the people affected will adopt the change	PDF	Standard	●	●	●
T52	Transition & Rollout Plan	Plan cutover, support, and go/no-go now, not at the end	PDF	Standard	●	●	●
ADAPTIVE SETUP							
T82	Kanban Board & Flow Policy	Set up the board, WIP limits, and flow rules	PDF	Standard	–	●	●
T83	Agile Estimation & Prioritization Guide	Agree how the team sizes and orders work	PDF	Standard	–	●	●
T84	Agile Metrics Tracker	Set up velocity, burnup, and flow tracking	PDF + Excel	Standard	–	●	●
T86	MVP & Experiment Canvas	When an assumption needs testing with a small release	PDF	Situational	–	●	●
Stage 3 · Executing · Deliver the work; Stage 4 runs alongside							
T53	Team Onboarding Plan	When a team member or vendor joins	PDF	Standard	●	●	●
T54	Meeting Agenda & Minutes	Every meeting	PDF	Essential	●	●	●
T55	Decision & Action Log	Every decision and action · keep updated	PDF	Essential	●	●	●
T56	Issue & Impediment Log	Whenever an issue or blocker appears · keep updated	PDF	Essential	●	●	●
T57	Iteration Plan & Review	Adaptive work: plan and review every iteration	PDF	Standard	–	●	●
T58	Test & UAT Plan	Before acceptance: plan testing and UAT, record results	PDF	Standard	●	●	●
T59	Quality Control Checklist	Before each deliverable is handed over	PDF	Standard	●	●	●
T60	Vendor Performance Scorecard	Monthly, when a vendor is delivering	PDF + Excel	Situational	●	●	●
T61	Knowledge Transfer Plan	Before a key person leaves or hands over	PDF	Situational	●	●	●
Stage 4 · Monitoring & Controlling · Exit: G3 Mid-delivery and G4 Go-live							
T62	Status Report	Weekly	PDF	Essential	●	●	●
T63	Executive Performance Dashboard	Monthly, for the steering committee	PDF	Standard	●	●	●
T64	Risk Report	Monthly, with the top risks and reserve	PDF	Standard	●	●	●

#	TEMPLATE	WHEN YOU USE IT	FILES	TIER	PREDICTIVE	HYBRID	ADAPTIVE
T65	Change Request Form	Whenever someone proposes a change	PDF	Essential	●	●	●
T66	Change Log	Every change request and its decision · keep updated	PDF	Essential	●	●	●
T67	Exception Report & Recovery Plan	When a forecast breaks a tolerance	PDF	Standard	●	●	●
T68	Root Cause Analysis Worksheet	After a serious problem, to find the root cause	PDF	Situational	●	●	●
T69	Phase-Gate Review Checklist	Predictive work: at each phase gate	PDF	Standard	●	●	—
T70	Customer Satisfaction Survey	At major milestones and at close	PDF	Standard	●	●	●
T71	Compliance Audit Checklist	When compliance evidence is due	PDF	Standard	●	●	●
T72	Retrospective Template	End of each iteration or phase	PDF	Standard	●	●	●
T73	Lessons Learned Register	Whenever a lesson appears · keep updated	PDF	Essential	●	●	●
T74	Team Performance Assessment	At set points, such as mid-project and close	PDF	Situational	●	●	●
Stage 5 · Closing · Exit: G5 Closure							
T77	Project Closure Checklist	Open it first to run the close; sign it last	PDF	Essential	●	●	●
T75	Deliverable Acceptance & Sign-off Form	As each deliverable is accepted	PDF	Essential	●	●	●
T76	Transition Readiness Checklist	Before go-live or handover	PDF	Standard	●	●	●
T78	Final Project Report	Report final results against the baselines	PDF	Standard	●	●	●
T79	Close-Out Lessons Learned Report	Hold the close-out lessons session; send lessons to O4	PDF	Standard	●	●	●
Stage 6 · Benefits Realization · Exit: post-implementation review decision							
T80	Benefits Realization Tracker	Monthly after go-live, by the benefits owner	PDF + Excel	Standard	●	●	●
T81	Benefits Realization Report & PIR	At the post-implementation review	PDF	Standard	●	●	●

Stage 4 runs alongside Stages 2 to 5. On adaptive work, Stages 3 and 4 repeat every iteration. Numbers never change; a new template is added at the end and appears here in its place in the order. Built by Amy Price.