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The PM Playbook is intended as a unique guide to using a simple, streamlined, world class project management **lifecycle**. It provides useful **templates** to help new and experienced project managers along the project journey.

The playbook incorporates the core techniques and artefacts used by project managers in many high-performing PM organisations. It is applicable to all kinds of project - business **change** projects, strategic **transformation**, new **product development**, **infrastructure** projects, and **delivery** projects. The playbook works equally well for **traditional** projects as it does for more **agile** development, and for large or smaller organisations.

Project Excellence PM Playbook

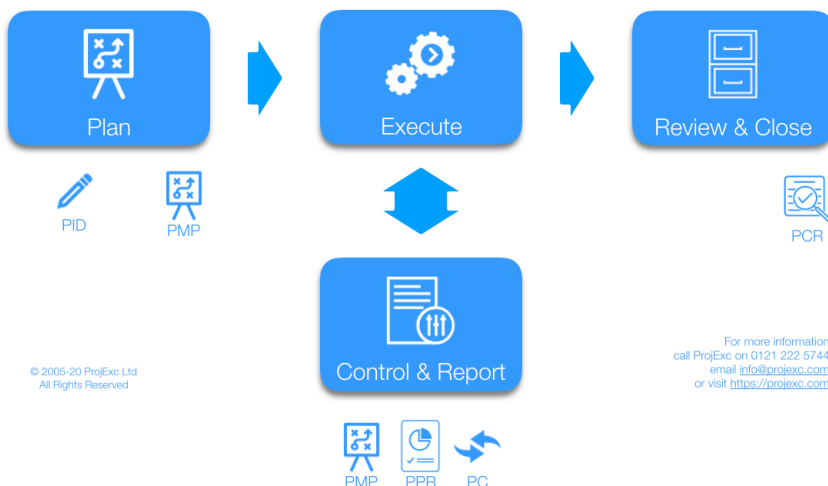
As can be seen in the diagram, there are 3 distinct phases to a project:

- 1) Project Planning,
- 2) Project Execution, and
- 3) Project Completion.

The execution stage will see the vast majority of the project activity.

The core project management tasks (as opposed to leadership of the project) are shown as:

- i) planning,
- ii) control & reporting (during execution), and
- iii) review and close.



In the following pages we include 5 key templates for managing your project:


- 1) Project Initiation Document (PID)
- 2) Project Management Plan (PMP)
- 3) Project Progress Report (PPR)
- 4) Project Change (PC), and
- 5) Project Closure Report (PCR)


If you need any help in applying the Project Excellence PM Playbook do get in touch with one of the team at ProjExc. You can find us and much more at <https://projexc.com>. Wishing you every success!


The ProjExc Team.


Project Initiation Document (PID)


Frozen on Approval


Orientation 	Project Title		Reference	
	Manager		Sponsor	
	Strategic Link			
	Background			

Purpose 	Objectives			
	Outputs			
	Benefits			

Success Criteria 	Scope Includes			
	Scope Excludes			
	Start Date		End Date	
	Milestones			
	Effort Days		Material Costs	

Considerations 	Constraints			
	Dependencies			
	Assumptions			
	Known Risks			
	Current Issues			
	Team Members			
	Stakeholders			


Kick-off 	Date/Time			
	Attendees			
	Agenda			

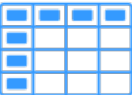
Sign-off 	Issue Date		Project Manager	
	Approval Date		Project Sponsor	
	Comments			


Project Management Plan (PMP)

Living Document

 Orientation	Project Title		Reference	
	Manager		Sponsor	
	Library Link			

 Plans	Timeline	
	Schedule	
	Financial	
	Resource	
	Stakeholder	
	Benefits	
	Communication	
	Documentation	
	Quality	
	Health & Safety	


 Registers	Blockers	
	Issues	
	Risks	
	Dependencies	
	Assumptions	
	Actions	
	Decisions	
	Change	

 Sign-off	1st Issue Date	
	Approval Date	
	This Issue Date	


Project Progress Report (PPR)

Frozen on Issue

Orientation 	Project Title		Reference	
	Manager		Sponsor	
	Reporting Period		Report Date	
	Library Link			


Status Summary 	Progress (%)		End Date	
	Timescales	Red / Amber / Green	Comments	
	Budget	Red / Amber / Green	Comments	
	Scope	Red / Amber / Green	Comments	


Headlines 	Progress Made	
	Blockers	
	Planned Progress	
	Main Issues	
	Main Risks	
	New Changes	


Observations 	Narrative	
	Help Needed	


Project Change (PC)


Frozen on Approval

 Orientation	Project Title		Reference	
	Manager		Sponsor	
	Change Title			

 Request	Requestor			
	Request Date			
	Change Description			

 Impact Assessment	Timescales			
	Budget			
	Scope			


 Approval	Change Ref.			
	Restrictions			
	Approver		Approval Date	


 Rejection	Reason for Rejection			
	Rejecter		Rejection Date	


Project Closure Report (PCR)

Frozen on Approval

	Project Title		Reference	
	Manager		Sponsor	
	Completion Date			

	Objectives Met			
	Variance?			
	Outputs Delivered			
	Variance?			
	Benefits Expected			
	Variance?			

	Successes			
	Challenges			
	Key Lessons			

	Issue Date		Project Manager	
	PM Comments			
	Approval Date		Project Sponsor	
	PS Comments			