

# Project Management Templates

Templates and Instructions per the SUKAD CAM2P™ Model  
Mounir A. Ajam



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# **Project Management Templates**

Templates and Instructions per the  
SUKAD CAM2P™ Model



Project Management Templates: Templates and Instructions per the SUKAD CAM<sup>2</sup>P™ Model

1<sup>st</sup> edition

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# Preface

This e-book is part of the CAM<sup>2</sup>P™ Strategic Program.

The CAM<sup>2</sup>P™ Strategic Program includes various sub-programs, one of them is a publishing (sub)-program. The publishing program has so far delivered numerous projects and more are on the way. Under this program, we have already published *The Inheritance, Project Management Foundation*<sup>1</sup> in English and Arabic, and *Redefining the Basics of Project Management*<sup>2</sup>. Although these books include a digital version, SUKAD has published a group of independent e-books.

As you read this, more books and e-books could have been published; for the latest, refer to SUKAD Multimedia site at <http://multimedia.sukad.com>.

## This e-Book

SUKAD has developed templates' packages in line with CAM<sup>2</sup>P™ Model. Each of these packages includes a blank template, instructions sheet, completed sample(s), flowcharts, and even video on the subject of a given template, where possible. Some of these are available on the SUKAD Portal<sup>3</sup>, products section.

This e-book includes the templates (forms) and instruction sheets for small and simple projects.

Some of these templates can also be used for medium, large, and more complex projects but the level of details for these larger projects would be substantially more than for small and simple projects.

# Section 1

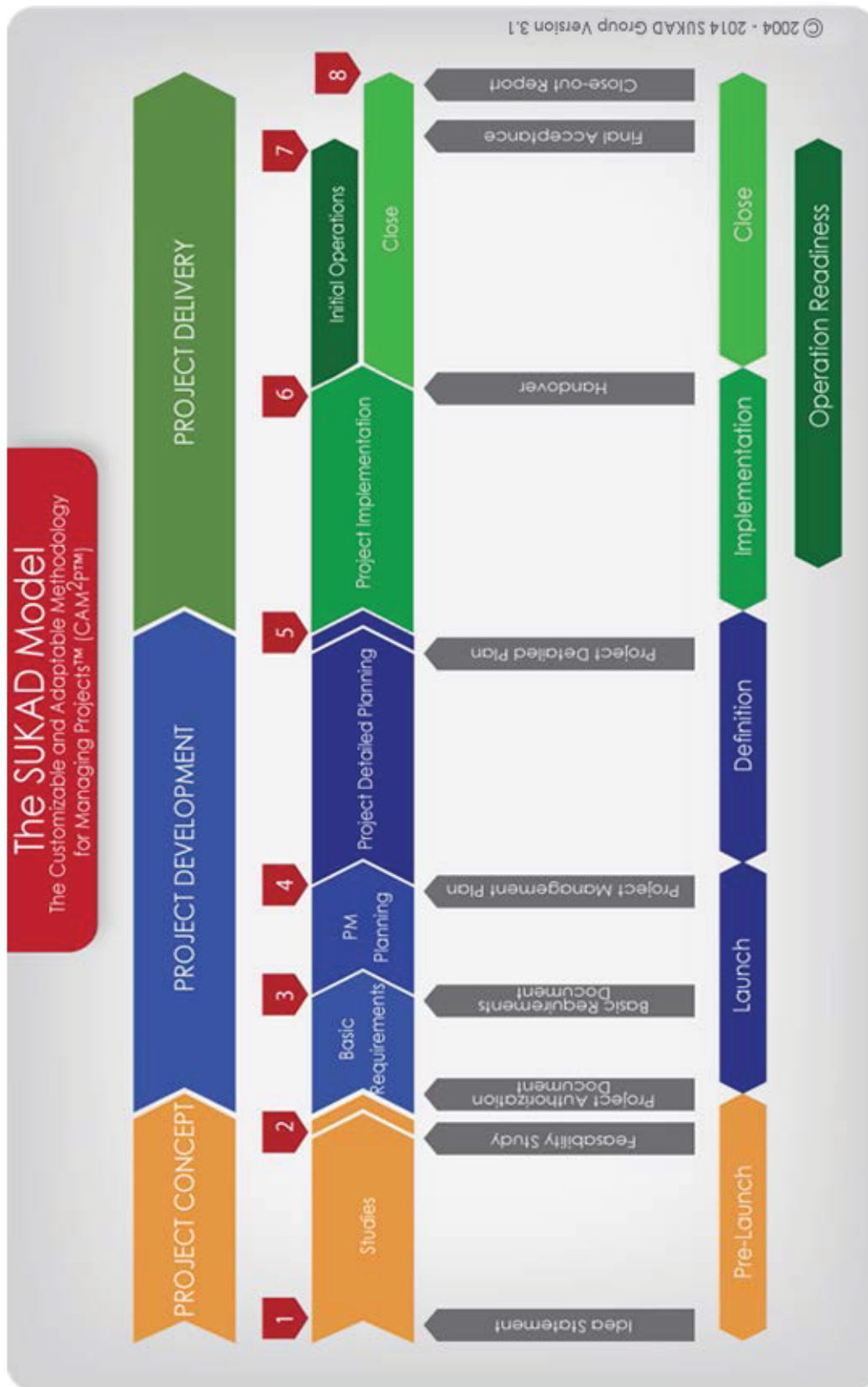
## The Standard CAM<sup>2</sup>P™ Model

The full name of the CAM<sup>2</sup>P™ model is The Customizable and Adaptable Methodology for Managing Projects™. As the name indicates, the intention is that this model is NOT one size fits all, and it has to be customized to the industry or organization and adapted to a business line, division, or project classification. Without customization and adaptation, one cannot expect optimal solutions and results. The customization and adaptation can be minor or significant, depending on the project domain, organizational cultures, and other factors.

In the Practical Project Management series, there is a series of sample projects that are either real or realistic to show how SUKAD and its clients have used the CAM<sup>2</sup>P™ model in the various projects' environments.

Finally, for more templates, like MS Project, Mind Maps, and Flowcharts, please visit the SUKAD Group site, [www.sukad.com](http://www.sukad.com), and register for access to these and other resources.

The image on the next page is the standard CAM<sup>2</sup>P™ model.



# **Section 2**

## Project Pre-Launch Stage

# 1 Idea Statement

## 1.1 Template

***Project General Information***<sup>4</sup>

---

Project Title			
Project Number		Assigned Date	
Idea Generator <sup>5</sup>		Organizational Unit	
Project Manager		Project Sponsor	
Part of a Program? <sup>6</sup>		Program Title	
Document Date		Document Version	

***Background Information***

---

***Idea Statement Sections***

---

<b>Project Description</b>
<b>Project Justification</b>
<b>Strategic Alignment</b>

## 1.2 Instructions

### ***General Instructions***

---

The idea statement covers three essential questions:

1. What is the project,
2. Why is the organization doing it, and
3. What is the project strategic alignment?

In some cases, the user may need to include the project background information.

Ideally, for most projects each item should be limited to one or two sentences. It is best to stay brief!

### ***Project Description***

---

Explain the project **output**.

What does the organization want to accomplish with this project?

What will the project give the organization when done?

**Output** means the product of the project, physical or otherwise; like house, software, school, business plan.

### ***Project Justification***

---

Why is the organization doing the project?

What is the driver – reasons for the project?

Justification is related to the outcome of the project, and it is about the expected benefits. *For example, the new software should improve productivity by X%.*

For business projects, usually, the primary driver is profit, increasing revenues, decreasing costs. However, for NGO<sup>7</sup>, government, or not-for-profit projects the driver might be social or community needs.

### ***Strategic Alignment***

---

How does this project align to the organization strategic direction and objectives?

The concept here is that organizations should not approve a project unless it aligns to the organization strategic direction, mission, and purpose.

# 2 Stage Gate 1

## 2.1 Template

### *Summary of Prior Work*

---

### *Stage Gate 1: Strategic Alignment*

---

**Decision**

Does the idea of the project align to the strategic direction?

Yes  No

• If yes,

- Approve/proceed                       Not approved/close project
- Require modifications                 Hold (close /do not close)

• If no,

Does the organization still wants to proceed?

Yes  No

Date: \_\_\_\_\_

**Explanation of Decision**

### *Management Other Comments or Instructions*

---

## 2.2 Instructions

### *Summary of Prior Work*

This section might be necessary for management reviews, especially if some of the decision makers do not have a clear idea on the project. The “submitter” should provide any additional information necessary that is not already on the Idea Statement.

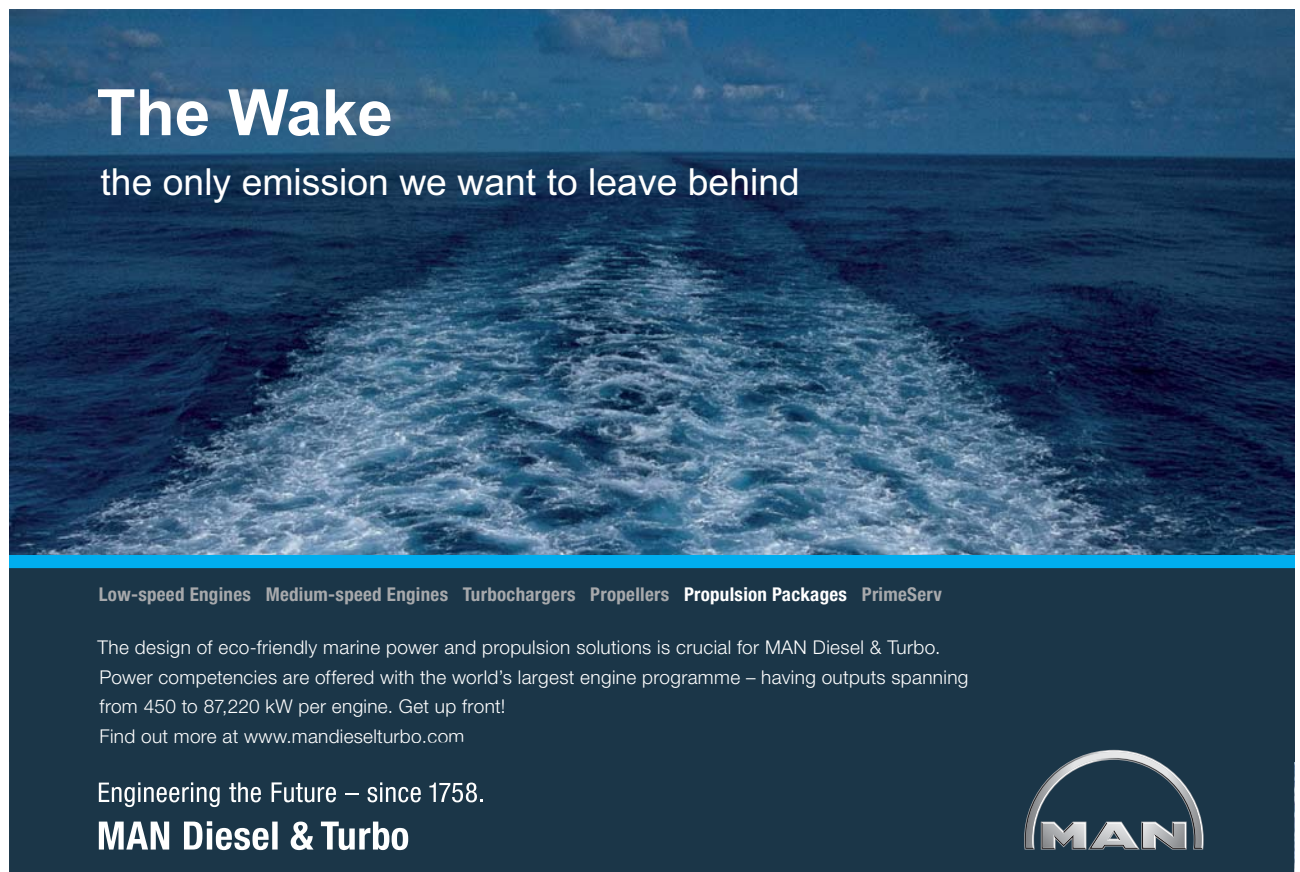
### *Stage Gate 1: Strategic Alignment*

Management can approve the idea as submitted, reject it, request revisions, or put it on hold for short or long time.

Even if the idea does not align to strategic objectives, the organization may still want to continue with the project for one reason or another. The author does not recommend this practice unless there are compelling reasons.

### *Management Other Comments or Instructions*

Management to provide any comments or instructions to let the sponsor and project manager know on how to proceed.




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# 3 Feasibility Study

## 3.1 Template

***Project General Information***

---

Same as Idea Statement

***Feasibility Study Sections<sup>8</sup>***

---

<b>Location Factor</b>
<b>Internal Cross Evaluations</b>
<b>Market Evaluations</b>
<b>Social / Community Evaluations</b>
<b>Technology Evaluations</b>
<b>Human Aspects</b>
<b>Legal / Regulatory Considerations</b>
<b>Sustainability Considerations</b>
<b>Major Project Risks</b>
<b>Other Considerations</b>
<b>Cost Estimate</b>

<b>Time Estimate (schedule)</b>
<b>Financial Considerations</b>
<b>Feasibility Study Conclusion and Recommendation</b>

## 3.2 Instructions

### *Technology Evaluation*

---

Technology evaluation is about any technology related matters that are relevant to the project.

These items are not part of the day-to-day environment. For example, no need to mention things like MS Project or MS Word. Rather, this would be for things like, this building would require total automation, or the software development must be per the latest technology.

The main idea is to document the potential risk if the project requires a new, or not proven, technology.

### *Financial Considerations*

---

Financial considerations are specific to funding or financing the project and are not about the cost of the project; project cost is independent.

Financial considerations would be required if the project is not part of the operating budget and would require specific funding, whether from the organization capital budget or outside financing.

Financial considerations **may also include** the economic model for the project and the return on investment calculations, or similar work.

The financial model could be an independent document.

### *Time Considerations*

---

Time considerations are about the expected project duration, project milestones, key dates, or any other time related topic to address.

### *Cost Considerations*

---

This section deals with the estimated total cost of the project.

The project cost includes external and internal costs, or internal resources hours.

It is common practice that some organizations do not account for their internal cost or effort, and that is an organizational choice. However, the author believes it is necessary to capture internal costs and effort since these are real costs to the project.

### *Human Resources Considerations*

---

Human resources considerations at the feasibility study are mostly about availability, capability, and expertise. Further, it is whether the organization can do the project with internal or external resources. The focus, at this time, is on the early stages since for the later stages, the team will update the staffing requirements once there are project management and project detailed plans.

This topic is not about naming people or assigning resources to the project! Resource allocation is part of the project or stage planning.

The advertisement features a circular logo on the left with three stylized human figures in the center, surrounded by four interlocking gears and four curved arrows pointing clockwise. To the right of the logo, the text reads: **UNLEASHING CHANGE MANAGEMENT** in large, bold, blue letters. Below this, it says **OCTOBER 18 & 19, 2018** and **DE RODE HOED AMSTERDAM**. At the bottom, there is a silhouette of an Amsterdam skyline including a windmill, a bridge, and several buildings. In the bottom left corner, the text 'Global Executive Events' is displayed. A hand cursor icon is positioned over a green oval button at the bottom right of the ad that contains the text 'Click on the ad to read more'.

---

### *Market Evaluations*

---

Market evaluations are specific to the market demand and supply. They will also include an assessment of the competition. Market evaluations are applicable if the project is releasing a new product to market or enhancing an existing one. The product could be a gadget or service. A course is a product; a computer application is a product, and consultancy service is a product.

Market evaluation is usually one of the most difficult items to assess; especially in locations where there are no reliable resources and statistics on market size; and other factors that will affect the market.

---

### *Social / Community Evaluations*

---

The social or community evaluations would be similar to market evaluations, but in this case, it is specific to the social and community needs and requirements, which would be applicable in government and not-for-profit projects.

---

### *Internal Cross Evaluation*

---

This item is specific to identifying **internal** synergies or overlaps. For example, is there another organizational unit working on a similar project? What other projects might influence this project negatively or positively and what other projects that are affected by this project.

---

### *Location Factor*

---

What are the location considerations for the project, if applicable?

If the project is delivering a facility, the location of the project will have an effect on the project cost, quality, and other factors. Similarly, for service projects, the location where to provide the service or sell a new product is also vital.

---

### *Legal / Regulatory Considerations*

---

Are there any legal or regulatory matters that might have an impact on the project? For example licensing, permit, registrations, tax laws, or any other consideration.

---

### *Sustainability Considerations*

---

Depending on the type of the project, the organization may need to consider sustainability matters in term of society, economy, or environment.

### *Other Considerations*

If there are any other items specific to the project and did not include with the above topic, this is the place to list and consider.

### *Major Project Risks*

Are there any significant risks that surface early in the project?

It is worth noting that the feasibility study itself is a form or overall project risk assessment since the team is conducting a feasibility study to decide whether to pursue an opportunity or not. For large projects, the team performs the risk assessment while planning each stage. For small-medium projects, the team will perform a risk assessment with the project detailed plan.

### *Feasibility Study Conclusion and Recommendation*

The project manager and team conclusion on the feasibility of the project and their recommendations. If the project is only feasible in a given window of opportunity, or under specific conditions, this is the place to state these peculiar conditions.

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# 4 Stage Gate 2

## 4.1 Template

***Summary of Prior Work***

---

***Stage Gate 2: Project Authorization***

---

**Decision**

Is the project feasible?

Yes  No

- If yes,
  - Approve/proceed                       Not approved/close project
  - Require modifications               Hold (close /do not close)

- If not feasible,  
Does the organization still wants to proceed?  
 Yes  No

Date: \_\_\_\_\_

**Explanation of Decision**

***Management Other Comments or Instructions***

---

## 4.2 Instructions

### *Summary of Prior Work*

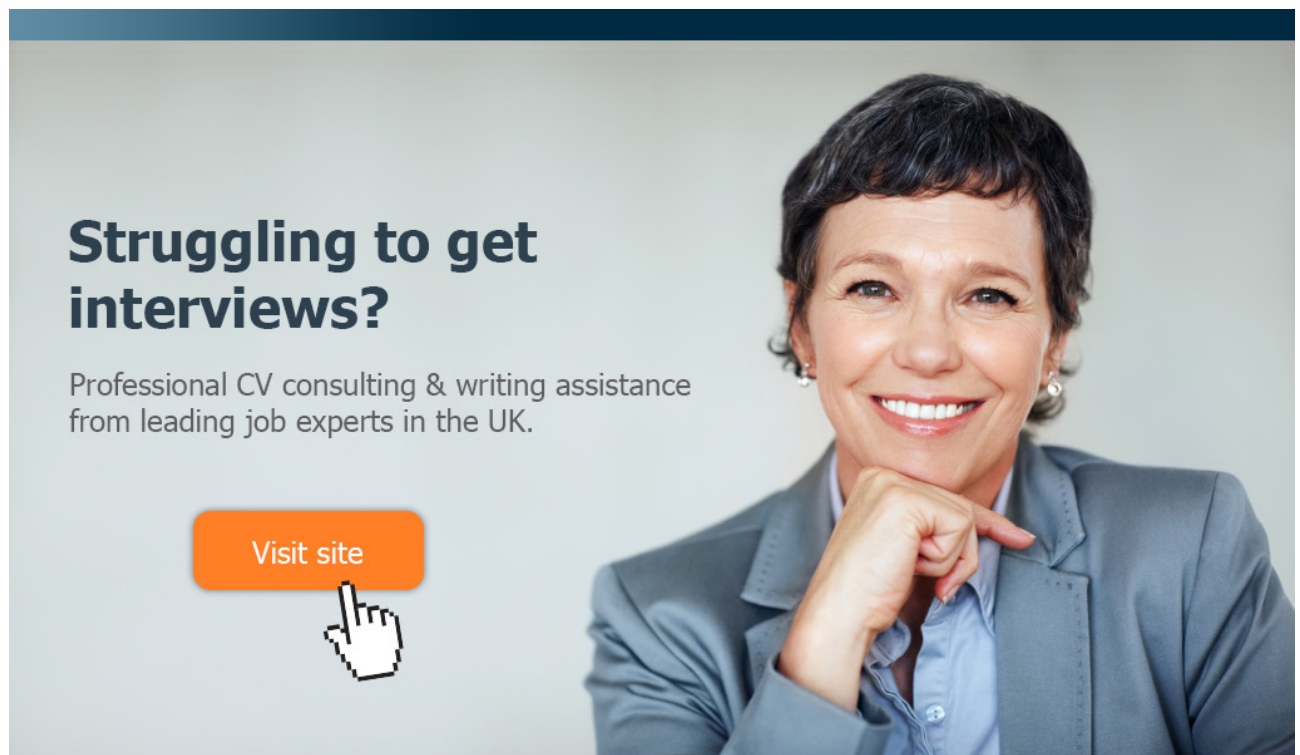
This section might be necessary for management reviews, especially if some of the decision makers do not have a clear idea on the project. The “submitter” should provide any additional information necessary that is not already on the Feasibility Study.

### *Stage Gate 2: Project Authorization*

Management can approve the feasibility study, reject it, request revisions, or put it on hold for short or long time. Further, even if the project is feasible, management might still decide to reject, revise or postpone the project if not a priority.

### *Management Other Comments or Instructions*

Management to provide any comments or instructions to let the sponsor and project manager know on how to proceed.



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# 5 Project Authorization Document

## 5.1 Template

***Project General Information***

---

Same as before

***Project Authorization Document***

---

<b>Product Description</b>
<b>Project Justification</b>
<b>Location</b>
<b>Time / Duration</b>
<b>Project Cost</b>
<b>Project Manager</b>
<b>Assumptions</b>
<b>Constraints</b>
<b>Major Risks</b>

<b>Stakeholders</b>
<b>Project Success</b>
<b>Stage Lessons Learned</b>

## 5.2 Instructions

### *Product Description*

---

The product description is an elaboration from the idea statement. It is a description of the output of the project.

### *Project Justification*

---

Project justification is also an elaboration from the idea statement and feasibility study. The project justification is about the purpose and drivers for the project.

### *Location*

---

The location considerations for the project; if applicable.

### *Time / Duration*

---

The project duration and expected completion date. It is also vital to stress if the completion date is a target date (preferred) or constraint (fixed).

### *Project Cost*

---

State the project rough order of magnitude estimate. Similarly, is the project cost a constraint or a target?

### *Project Manager*

---

Name the project manager for this project and his/her authority; if not defined per organizational system.

---

***Assumptions***

---

What are the assumptions that the team has to make in order to proceed?

Assumptions are things the team does not know, yet, but need to take a position in order for the team to proceed. Assumptions could become risks if the team does not address them in a timely manner.

---

***Constraints***

---

The constraints are restrictions imposed by management, clients, nature, among other factors. Constraints limit the team's ability to perform the project work in an optimal approach.

Examples: one can set limits – constraints on time or cost; no to exceed values. Weather can be a constraint, for example 'cannot work between 12:00 and 15:00 outdoor during the summer months'.

---

***Major Risk Identified***

---

List any identified significant risks.

---

***Stakeholders***

---

List all of the project stakeholders. All of those with an interest or affected by the project.

---

***Stage Lessons Learned***

---

Lessons learned is not part of the project authorization document, but the team can include here since this is the last deliverable in the stage, and the team can document any lessons learned that they encountered during this stage.

Ideally, the team should list the lessons learned and communicate them to the organization.

# **Section 3**

## Project Launch Stage

# 6 Basic Requirements Document

## 6.1 Template

### *Project General Information*

Same as before

### *Basic Requirements Document*

<b>Description of the Product</b>
<b>Characteristics</b>
<b>Expectations and Requirements</b>
<b>Stakeholders' Input</b>

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<b>Alternatives Evaluations</b>
<b>Deliverables and Initial Work Breakdown Structure</b>
<b>Project Boundaries</b>
<b>Constraints</b>
<b>Assumptions</b>
<b>Value Improving Practices</b>
<b>Sustainability Requirements</b>
<b>Acceptance Criteria</b>
<b>Success Factors</b>
<b>Project Manager Comments</b>

## 6.2 Instructions

### *Description of the Product*

---

This section is about describing the product of the project, including any additional information that the team developed, or gathered, during project pre-launch stage. The description here is an elaboration of the information listed earlier, and the team should expand on the description. However, the team must be careful in not going into too much detail since that is part of the project detailed planning effort.

### *Characteristics*

---

Explain the characteristics of the project and required features, where applicable.

---

***Expectations and Requirements***

---

Work with the client (internal or external) to explore for the client's expectation and to transform those implicit expectations into explicit and requirements. In general, requirements are specific items that one can list and itemize whereas expectation is a more 'state-of-mind' and not easy to document. To enhance the chance of success, a project manager cannot just depend on listed requirements.

*Please note this is NOT about the expectation of the project manager.*

---

***Stakeholders' Input***

---

It is implicit that to identify the project requirements one will need to seek the input of the various stakeholders.

The author added this as a separate topic to emphasize the need to do seek out and explore for the input of the stakeholders and not to limit the discussions/input to management or the key stakeholders. The team must gather input from all relevant stakeholders, directly or indirectly.

---

***Alternatives Evaluations***

---

It is necessary to consider and list the alternatives here, leading to a selection of the best alternatives. It is also possible that the team could list some alternatives here for review in the next stage or during the project management planning.

The alternatives could be to the project, scope, schedule, location, procurement, or others.

---

***Deliverables and Initial Work Breakdown Structure***

---

Deliverables refer to the main deliverables related to the final project output; the product.

The team will use a work breakdown structure (WBS) to show these main deliverables and must provide a clear description of the deliverables. Main deliverables mean the higher level components (on WBS); in other words, one or two levels at most.

---

***Project Boundaries***

---

Boundaries are particularly valuable to draw and are crucial for clarity for the project and its components; especially where there could be potential ambiguity or unclear scope areas. In other words, what is included in the project and what is not included.

### Constraints

While the team is collecting the requirements and developing the BRD, the team needs to revisit the defined constraints, from the PAD or feasibility study, to determine whether some of the constraints have been relaxed, removed, or new ones added.

### Assumptions

Same as constraints, the team needs to revisit the assumptions, from earlier work, to determine whether they are still valid or not, and whether there are new assumptions.

### Value Improving Practices<sup>9</sup>

The BRD development time provides the team with the opportunity, during the project development phase, to introduce the value improving practices. This exercise is necessary since value improving practices may present possible alternatives.

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---

### ***Sustainability Requirements***

---

Depending on the type of the project, the team may need to consider sustainability matters in term of society, economy, or environment. Sustainability might be a new topic to many and will likely bypass, but we decided to include here, first to raise awareness, and second to consider.

---

### ***Acceptance Criteria***

---

Completion is different from acceptance, and acceptance is different from success.

- What are the minimal requirements for management or the client to accept the product of the project?
- Is it possible to reject the product of the project and under what conditions?
- What would be the legal ramification if the client's organization did not accept the product of the project?

---

### ***Success Factors***

---

Will the organization measure success on this project?

How would they measure it?

Would the organization use one measure or more?

What would be the criteria for each measure?

Refer to <http://sukadway.sukad.com/> for more explanation on the SUKAD Four Dimensions of Project Success, or *Redefining the Basics of Project Management* book.

---

### ***Project Manager Comments***

---

The Project Manager and Team can add anything they want to say to expedite the decision-making process.

# 7 Stage Gate 3

## 7.1 Template

### *Summary of Prior Work*

---

### *Stage Gate 3: Stakeholders' Alignment*

---

**Decision**

Approved  Not Approved  Revise  Hold

Date: \_\_\_\_\_

**Explanation of Decision**

### *Management Other Comments or Instructions*

---

## 7.2 Instructions

### *Summary of Prior Work*

---

This section might be necessary for management reviews, especially if some of the decision makers do not have a clear idea on the project.

The “submitter” should provide any additional information necessary that is not already on the basic requirements document.

### *Stage Gate 3: Stakeholders' Alignment*

Management can approve the basic requirements document as submitted, reject it, request revisions, or put it on hold for short or long time.

It is crucial at this stage that the project manager and the sponsor gather all of the relevant stakeholders to ensure that they align on the requirements before the team proceed further into the project.

### *Management Other Comments or Instructions*

Management to provide any comments or instructions to let the sponsor and project manager know on how to proceed.



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# 8 Project Management Plan

## 8.1 Template

*General Sections*

---

<b>Project Management Strategy</b>
<b>Project Procurement Strategy</b>
<b>Project Life Span Selection</b>

*How to Sections*

---

<b>How to Define the Project</b>
<b>How to Manage the Project</b>
<b>How to Control the Project</b>
<b>How to Handle Change on the Project</b>
<b>How to Get Ready for Operations</b>
<b>How to Close the Project</b>

***People Aspects***

---

**Project Management Team****Project Team****Project Stakeholders****Project Communication Requirements*****Class 2 Estimate***

---

**Project Schedule****Project Cost Estimate****Project Manager Comments**

## 8.2 Instructions

***Project Management Strategy***

---

The project management plan includes the strategy / approach that the team will use to manage the project from this point through closure.

The following sections address the various components of the project management plan.

A key point to highlight here is the differentiation between the project management plan and the project detailed plan. The project management plan is about managing the project whereas the PDP is about the details of the project that the team will use in the implementation.

### ***What is the Project Procurement Strategy***

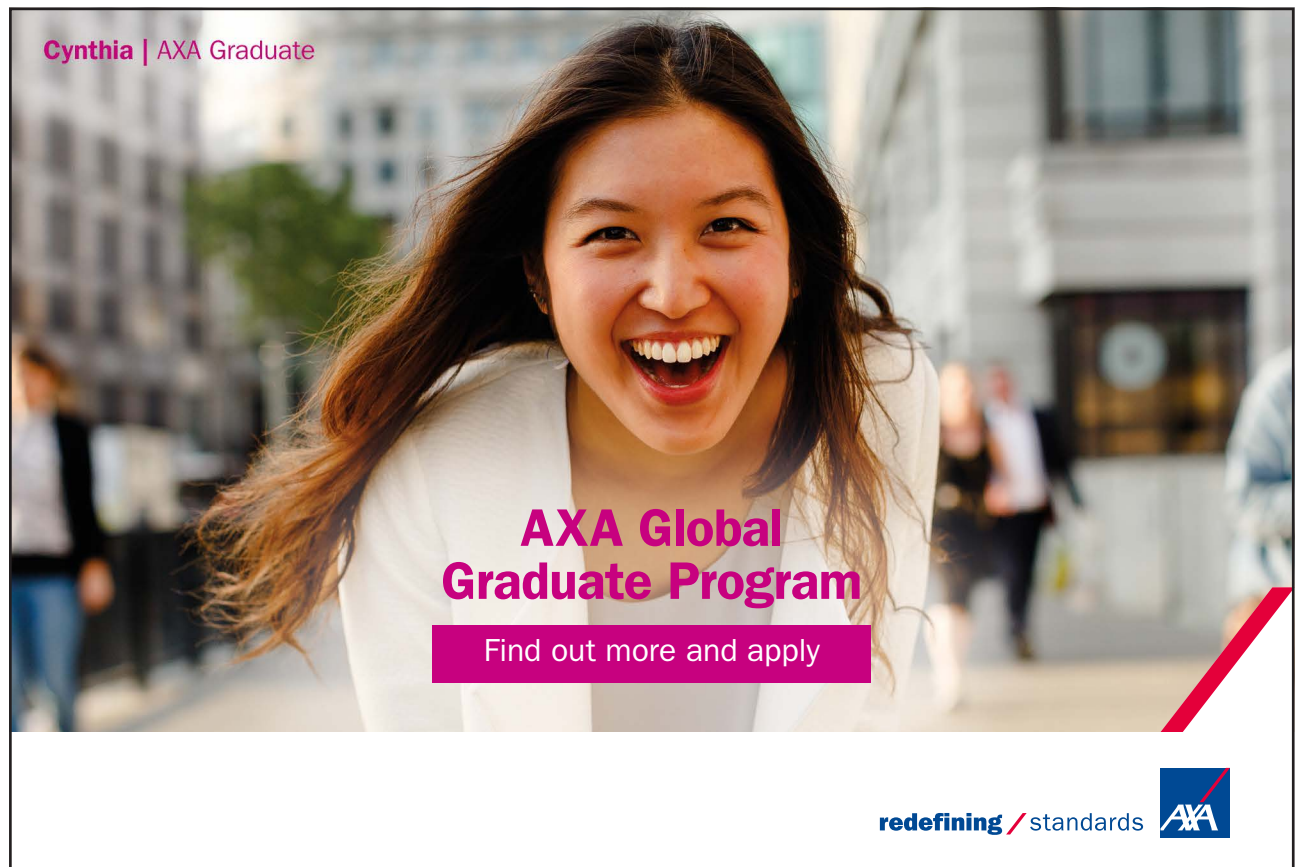
If the organization needs to procure goods and services for the project or some of its components, what is the team strategy in that regard?

Note that this is not a procurement plan; it is only a strategy – approach.

### ***Project Life Span Selection***

The project life span should be in accordance with the organization standards. However, there might be a need to deviate from the standard model, and the project manager needs to address the recommended deviations or changes for management approval.

If the project were not a typical project for the organization, it would be useful for the project manager to clarify what would be accomplished at each stage (output of the stage) along the project life span.



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---

### *How to Define the Project*

---

The project manager<sup>10</sup> to explain how to define the project; how<sup>11</sup> the project management team plans to perform the project definition and develop the detailed planning. In other words, how will the team accomplish the next stage?

This effort should cover all of the functions; scope, time, cost, human resource, procurement, and all other functions. That means: how to define the scope, how to define the cost (cost estimate), how to develop the staffing requirements, and similarly for all other functions.

---

### *How to Manage the Project*

---

The answer to this question could be as simple as “follow the organization standard” and this might be satisfactory if the organization has well-defined processes, and the project is small/simple. For larger projects, or projects with unique requirements, the project manager needs to explain how to direct and manage the work **from this point onward**.

---

### *How to Control the Project*

---

Some might prefer to merge the ‘manage and control’ questions, and that would be acceptable. The author prefers to separate these topics for better clarity.

The project manager to explain how the project management team plans to monitor the performance versus plan(s), and how to handle any corrective or preventive actions?

Similar to the previous item this could be as simple as “follow the organization standard.”

---

### *How to Handle Change on the Project*

---

Same as the previous two points.

It is particularly valuable from a governance perspective that projects comply with the idea statement, objectives, PAD, PM Plan and PDP. In other words, control and change management can start from the idea statement and not wait until there is a project detailed plan. It would be necessary to document changes and not implement a change without proper approval.

Many organizations do not capture project changes unless there is a contract, but it is advisable to alter their practices and, at least document all changes from each of the control reference points. In other words, identify changes from PAD to PM Plan, from Basic Requirements to PDP, in addition to, any changes to the PDP during implementation<sup>12</sup>.

---

### *How to Get Ready for Operations*

---

If the project would have operational requirements than what is required to get ready for handover, initial operations and full operations?

Getting ready for operations is highly dependent on project type and may include things like operational procedures, maintenance procedures, users' manuals, training program, among other requirements.

---

### *How to Close the Project*

---

It is still somewhat common where organizations do not properly perform project closure. The SUKAD model emphasizes that this is not acceptable. Therefore, every project must go through proper closure.

In this section, the team must address how to perform project closure, will the closed out report includes lessons learned, reconciliations, updates to organizational records, and any future follow up.<sup>13</sup>

---

### *Project Management Team*<sup>13</sup>

---

Define the team requirements by considering the number of management team members required for the various project components. Consider if they have the necessary expertise or competence for the project. For larger projects, this section will include the project organization chart, staffing plan, and RACI chart.

The project management team may include estimators, cost specialists, planners, schedulers, contract administrators, safety officers, quality managers, and others. These are all of the roles that will **support the project manager in managing the project**.

---

### *Project Team*

---

The project team consists of the project management team and all other 'functional / technical' members who will perform the project work. Consider if the team members have the required expertise or competence for the specified work.

This section will expand on the project organization chart, staffing plan, and RACI chart from the previous section. We could also merge this and the previous section into one section, for smaller projects.

At this stage, the focus is on identifying the technical/functional team members needed to work on the PDP. During the PDP development, the PMT will update the project team with a focus on the implementation team.

It is likely the project team (functional and technical resources) will change from one stage of the project to another<sup>14</sup>. While working the project management plan, the focus at this time is on the detailed planning or implementation teams, which are likely to be outsourced.

### ***Project Stakeholders***

---

The project manager and team need to review the stakeholder's list, understand the role of each, how do they affect the project or affected by the project, and how to manage the relationship. It is critical to keep the stakeholders informed and involved, where necessary.

For clarity, project stakeholders are critical for the project and the team must deal with them effectively, since the idea statement.

### ***Project Communication Requirements***

---

Identify the communication requirements for the project various stakeholders by the information required, how often is required, in what format is it required, who is the custodian of this information?

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---

### ***Project Schedule***

---

At this time, the project management team would have a better idea on the project and level of effort required. Therefore, the team should develop a schedule, or update the initial one from the feasibility study. This schedule might lead to changes to the project completion date. It would be beneficial to use a tool like MS Project, or others.

It is worth noting that this schedule is not the final one; the final schedule will be part of the Class 3 estimate, which the team will develop with the detailed plan.

---

### ***Project Cost Estimate***

---

Same as for the project schedule. With the basic requirements and project management planning effort in place, the team will be able to update the project cost estimate.

---

### ***Project Manager Comments***

---

The Project Manager/Team can add anything they want to say to expedite the decision-making process.

---

### ***Special Message***

---

Those readers who are familiar with the project management plan in the PMBOK® Guide might think that the above is the same thing. It is important to stress that although there are similarities, they are not the same.

First, the **project management plan** in the PMBOK® Guide should repeat with every stage, and then in reality it is a **stage management plan**.

Second, the project management plan content per the PMBOK® Guide is split between the CAM<sup>2</sup>P™ **stage management plan and the stage detailed plan**. A reminder, the management plan focus on managing (management processes) whereas the detailed plan focus on the details of ‘work’ for executing.

Third, the stage management plan and project management plan are quite similar, in term of focus and content. However, one is specific to a given stage whereas the other is for the project, the whole project from idea to closure.

# 9 Stage Gate 4

## 9.1 Template

### *Summary of Prior Work*

---

### *Stage Gate 4: Project Management Plan Approval*

---

**Decision**

Approved  Not Approved  Revise  Hold

**Funding:** is there a need for advance funding at this stage?  Yes  No

If yes, funding approved?  Yes  No

Date: \_\_\_\_\_

**Explanation of Decision**

### *Management Other Comments or Instructions*

---

## 9.2 Instructions

### *Summary of Prior Work*

---

This section might be necessary for management reviews, especially if some of the decision makers do not have a clear idea on the project.

The “submitter” should provide any additional information necessary that is not already on the project management plan.

### ***Stage Gate 4: Project Management Plan Approval***

---

Management can approve the project management plan as submitted, reject it, request revisions, or put it on hold for short or long time.

For some capital intensive projects, with the stage gate 4 approvals, there might be a need for partial funding to carry out the work of the next stage or long lead items. Long lead items are items that take a long time to manufacture, and the team will need to procure (place orders) early to secure delivery in due time and not delay the project.

### ***Management Other Comments or Instructions***

---

Management to provide any comments or instructions to let the sponsor and project manager know on how to proceed.



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# **Section 4**

## Project Definition Stage

# 10 Project Detailed Plan

## 10.1 Template

<b>Scope of Work &amp; WBS</b>
<b>Quality, Safety, Health, Environment</b>
<b>Time Estimate (Schedule)</b>
<b>Cost Estimate</b>
<b>Time Phased Budget</b>
<b>Human Resources</b>
<b>Stakeholders</b>
<b>Communications</b>
<b>Risk Management</b>
<b>Procurement</b>
<b>Sustainability Requirements</b>
<b>Other Considerations</b>
<b>Project Manager Comments</b>

## 10.2 Instructions

### *Scope of Work & WBS*

---

Provides a detailed description of the project scope of work, including a list of deliverables and their descriptions. It would also be highly beneficial to update the initial WBS and expand it to the necessary level of details. The WBS is a core document that the team should refer to for the development of all the subsequent sections.

The approach that the author recommends is to draw the WBS first (using WBS Pro, MS Office, or Mind Manager). Next, to develop the detailed scope of work and deliverables, the user can provide the details for all of the WBS Elements.

If one uses Mind Manager, then export the WBS with text to MS Word, review and finalize to generate the project scope of work.



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---

***Quality, Safety, Health, Environment***

---

Depend on the project some of these factors might not be a consideration.

In general, what the team needs here is to specify the applicable standards, laws, regulations, and internal policies that the project should comply with. Once the team defines the compliance requirement, then one can plan what the team must do to ensure compliance.

Notice that later there is a sustainability section. The difference is the environment, in the context of this section, is about compliance with laws and regulations, whereas sustainability is a choice.

---

***Time Estimate (Schedule)***

---

With the detailed scope of work defined, and the compliance items identified, the project manager and team can develop the project detailed schedule, which would be an expansion of the earlier schedule. This schedule would become a control document for implementation, and the team will measure the final reconciliation against it.

---

***Cost Estimate***

---

Same as with the time estimate, the team can develop a cost estimate. Remember to consider internal and external costs. At this time of the project, the cost estimate should be per the work packages.

***Time Phased Budget***

The time-phased budget is the combination of the scope of work, schedule, and cost estimate. The project manager and the team shall allocate the budget to the various accounts and develop the time-phased budget for the project, which is the allocation of the project expected cost over time.

Depend on the project financing requirement, the time-phased budget will be required to develop the project cash flow.

---

***Human Resources***

---

In the previous stage, the team defined the project management team and the other team members required for this stage. At this time, the team need to revisit this exercise and update the team requirements with a focus on the upcoming stages.

For larger projects, the organization may outsource implementation. In that case, the service provider will develop the detailed staffing for implementation, but the project owner (client) must still address its own (internal) staffing requirements.

This section will include the resources, numbers, names, positions, roles, expertise, availability...etc.

---

### ***Project Stakeholders***

The project manager and the team may need to expand on the stakeholders plan from the project management plan. Further, they will review the stakeholder's list, understand the role of each stakeholder, how do the stakeholders affect the project or is affected by the project, and how to manage the relationship. It is critical to keep the stakeholders informed and involved, where necessary.

---

### ***Communications***

Update the communication plan from the earlier section and expand on it to covers all of the necessary details. The team must develop the details for the internal and external communication.

---

### ***Risk Management***

During the development of the project detailed plan is the time to perform detailed risk assessment for the project, including identification, analysis, and response planning.

---

### ***Procurement***

If there are any outsourcing requirements, the team must define them and develop the proper plan to conduct procurement.

---

### ***Sustainability Requirements***

Depending on the type of the project, the team may need to consider sustainability matters in term of society, economy, or environment. Sustainability might be a new topic to many and will likely bypass, but we decided to include here, first to raise awareness, and second to consider.

---

### ***Other Considerations***

Are there any other requirements that might be specific to this project?

---

### ***Project Manager Comments***

The Project Manager and Team can add any other information to expedite decision making.

# 11 Stage Gate 5

## 11.1 Template

### *Summary of Prior Work*

---

### *Stage Gate 5: Final Approval*

---

**Decision**

Approved    Not Approved    Revise    Hold

**Funding**

Required    Not Required Date: \_\_\_\_\_

**Explanation of Decision**

### *Management Other Comments or Instructions*

---

## 11.2 Instructions

### *Summary of Prior Work*

---

This section might be necessary for management reviews, especially if some of the decision makers do not have a clear idea on the project. The “submitter” should provide any additional information necessary that is not already on the project detailed plan.

### ***Stage Gate 5: Final Approval***

Management can approve the project detailed plan as submitted, reject it, request revisions, or put it on hold for short or long time. In general, this is a key gate since typically after the point, the team start implementation, which requires most of the effort and funds.

In most cases, management might need to have a special approval for funding the project, which might be required from the executive committee, board of directors, partners, shareholders, ministries, or others.

### ***Management Other Comments or Instructions***

Management to provide any comments or instructions to let the sponsor and project manager know on how to proceed.



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# **Section 5**

## Project Implementation Stage

# 12 Implementation Comments

## 12.1 Template

<b>General Statements</b>
<b>Deviations and Corrective Actions</b>
<b>Preventive Actions</b>
<b>Project Changes</b>
<b>Project Manager Comments</b>

## 12.2 Instructions

### *General Statements*

In term of process, the project implementation stage for small / simple projects is similar to PMBOK® Guide executing process group.

The main effort is on completing the deliverables (work packages) that the team outlined in a detailed plan. During the implementation, project control and change management will be more focused and detailed. As a result, the execution team will be performing work while the project management team would oversee, manage, and monitor the performance against the detailed plan, identify deviations and the need for corrective actions, undertake preventive actions, and manage change. All of these concepts are happening throughout the project, but now they become more visible and detailed during implementation due to details from the PDP.

### *Deviations and Corrective Actions*

As the executing team performs work, they will encounter differences (variances from the plan). The project manager and PMT will evaluate these deviations, determine the need for corrective actions, and take the necessary actions to correct where possible.

The deviations could be related to any function, such as scope, quality, human resource, time...and other functions.

### *Preventive Actions*

---

In a way, preventive actions can be hidden since it is what the project management team should be doing on an ongoing basis. The project management team must be proactive to prevent errors, deviations, or incidents.

### *Project Changes*

---

Managing change is an ongoing effort, and the team must understand the organizational processes to manage change. As the author stressed on earlier documents, the team should be managing change between the stages and not only in the implementation.

### *Project Manager Comments*

---

The Project Manager and Team can include anything they want to add to expedite the decision-making process, to deliver the project successfully, and to obtain customer's acceptance.



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# 13 Stage Gate 6

## 13.1 Template

### *Summary of Prior Work*

---

### **Stage Gate 6: Ready for Handover?**

---

**Decision**

Approved    Not Approved    Revise    Hold

Date: \_\_\_\_\_

**Explanation of Decision**

### *Management Other Comments or Instructions*

---

## 13.2 Instructions

### *Summary of Prior Work*

---

This section might be necessary for management reviews, especially if some of the decision makers do not have a clear idea on the project.

The “submitter” should provide any additional information necessary that is not already on the implementation documentation.

**Stage Gate 6: Ready for Handover?**

Management, team, and the client will typically meet to discuss the status, inspect the work, verify completion, and validate the output in order for the client to accept the handover of the project from the project management team to the operation / end users team. Because of this review, the client can accept the work, reject it, request revisions, or require fixing any defects.

**Management Other Comments or Instructions**

Management to provide any comments or instructions to let the sponsor and project manager know on how to proceed.

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# **Section 6**

## Project Operation Readiness Stage

# 14 Operation Readiness Summary

## 14.1 Template

### *Pre-Handover*

---

<b>Policies</b>
<b>Operations Procedures</b>
<b>Maintenance Procedures</b>
<b>Training Summary</b>
<b>Testing &amp; Pre-Commissioning</b>

### **Handover**

---

<b>Inspections and Reviews</b>
<b>Initial Acceptance</b>
<b>Exception Items</b>

### *Commissioning*

---

<b>Commissioning Summary</b>
------------------------------

***Initial Operations***

---

**Initial Operations Summary**

***Final Acceptance***

---

**Review of Exception Items**

**Final Inspection and Reviews**

**Final Acceptance**



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**Others****Stage Lessons Learned****Project Manager Comments****14.2 Instructions****General Instructions**

There are no specific processes to highlight here except the need to focus on getting ready for operations if there is an operation for the project. The following sections highlight the key components where the project team may need to document.

It is necessary to note that all of the topics listed below if applicable should have been identified during the project management planning, and included in the project management plan. During operation readiness stage, the team would be performing the ‘work’, and the ‘work’ could be writing procedures, performing tests, training, or commissioning a facility.

**Pre-Handover***Policies*

If there are any policies, then the team need to list and document them.

*Operations Procedures*

If the project is about delivering a product (facility, business, house...) there will likely be a need for operational procedures. The operations could be operating machines in an industrial plant or handling financial, human resources, or marketing matters.

*Maintenance Procedures*

Similar to operations, especially for facilities projects, there could be items to maintain on a regular basis, and this is the place to list and document these procedures.

*Training Summary*

For most projects, whether they are producing something new or modifying an existing system, there is likely a need to train the “users” on how to do their jobs per the new/modified system. The training requirement is likely whether the project is about machines or business processes.

---

### *Testing and Pre-Commissioning*

---

The term pre-commissioning might be applicable to facilities projects, whereas testing, is more generic. Same as training, any new or modified system will likely require testing before the team put into operation, and the team need to provide the proper documentation.

---

## **Handover**

---

### *Inspections and Reviews*

---

During the handover process, usually the project team and client's personnel will get together to inspect and review the work to determine if everything is ready to handover the product from the project team to the client / operations. The team to document all activities.

### *Initial Acceptance*

---

If the team completes all deliverables per plan and specifications, the client will issue a completion certificate indicating initial acceptance of the product. The term 'initial' is to refer to the fact that this is not the final acceptance; final acceptance will be after commissioning and initial operations if applicable.

### *Exception Items*

---

On some projects, all deliverables might be complete but with some exceptions. If the exception items are necessary for operations, the client will not accept the handover until all operational items have been satisfactory completed. However, there might be some things, maybe cosmetic in nature, where the client can provisionally accept the product, on the condition that the team will resolve before final acceptance.

---

## **Commissioning**

---

If the project require commissioning (startup), the team will need to document all activities with the required details.

---

## **Initial Operations**

---

If there is a pilot or an initial operations period, the team will document the necessary information.

---

## **Final Acceptance**

---

### *Review of Exception Items*

---

The team will review the list of exception items to perform the necessary work and document the results.

### *Final Inspection and Reviews*

Project team and client's personnel will get together for the final inspections and reviews of the work to determine if everything is working correctly for the final acceptance.

### *Final Acceptance*

Document and issue the final acceptance certificates.

## **Others**

### *Stage Lessons Learned*

Document all lessons learned, for this stage.

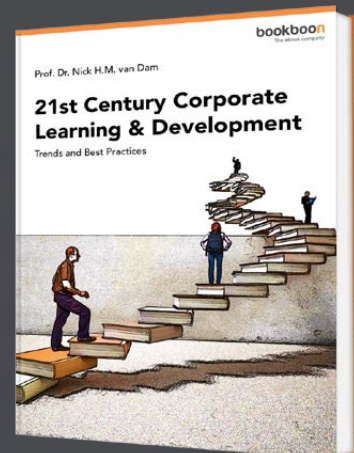
### *Project Manager Comments*

The project manager and team can add any additional information that might be necessary or helpful.

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# 15 Stage Gate 7

## 15.1 Template

### *Summary of Prior Work*

---

### *Stage Gate 7: Final Acceptance*

---

**Decision**

Approved    Not Approved    Revise    Hold

Date: \_\_\_\_\_

**Explanation of Decision**

### *Management Other Comments or Instructions*

---

## 15.2 Instructions

### *Summary of Prior Work*

---

This section might be necessary for management reviews.

The “submitter” should provide any additional information necessary that is not already on the various documents.

---

**Stage Gate 7: Final Acceptance**

---

Management can accept the final product or require further work before they can grant the final acceptance.

---

**Management Other Comments or Instructions**

---

At this stage, the only remaining work is to close the project.

Management to provide any comments or instructions to let the sponsor and project manager know on how to proceed to finalize the project closeout.



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# **Section 7**

## Project Close Stage

# 16 Project Close Comments

## 16.1 Template

<b>Performance Reconciliation</b>
<b>Lessons Learned</b>
<b>Project Success (Four Dimensions)</b>
<b>Future Follow-Up</b>
<b>Project Manager Comments</b>

## 16.2 Instructions

### *Performance Reconciliation*

Highlight the main variations between the plan and actual performance in term of deviations, changes, and similar differences. The team would capture most of this information while implementing the project.

### *Lessons Learned*

Summarize the lessons learned from the stages and add any other lessons learned that the team can identify.

### *Project Success*

Evaluate the project success per the four dimensions. At project close, the team can assess two of the measures, maybe three. Whatever they cannot measure yet, the team will identify potential timing on when the organization can assess.

*Future Follow-Up*

Document any future follow-up that might be required in term of what and when. For example, if the team cannot measure project success at close out, when can they do so? The same for the project business success? The team should think out of the box and consider anything that could be necessary or suitable to pursue in the future – related to this project.

*Project Manager Comments*

The project manager and team can add anything they want to document for the final closure.

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# 17 Stage Gate 8

## 17.1 Template

### *Summary of Prior Work*

---

### *Stage Gate 8: Project is Closed!*

---

**Decision**

Approved    Not Approved    Revise    Hold

Date: \_\_\_\_\_

**Explanation of Decision**

### *Management Other Comments or Instructions*

---

## 17.2 Instructions

### *Summary of Prior Work*

---

At closure, the only thing to mention here is that the project is complete, close out report done, and the team provided the necessary information for the update of the organizational records.

### *Stage Gate 8: Project is Closed!*

---

Management can approve the project closure as submitted or request revisions.

### *Management Other Comments or Instructions*

---

Most likely, there is nothing to add here!

# Appendices

## Appendix A: Additional Resources

The following is a list of additional resources for further reading.

For the most current list of SUKAD publications, please follow this link: <http://www.sukad.com/publications/sukad-project-management>.

### Print Books

1. The Inheritance
2. Project Management Foundation
3. Redefining the Basics of Project Management

### E-Books

1. Project Management for the Accidental Project Manager<sup>15</sup>
2. Project Management I: Challenges, Opportunities, Methodology
3. Project Management II: The Customizable and Adaptable Methodology for Managing Projects™
4. Project Management III: Managing a Project across the Project Life Span
5. Project Management IV: Practical Applications of The CAM<sup>2</sup>P™ Model

### Online Resources

1. The SUKAD Group Website: <http://www.sukad.com/>
2. The SUKAD Way™ Site: <http://sukadway.sukad.com/>
3. Project Management Knowledge Portal: <http://knowledge.sukad.com/>
4. Project Management Blog (English): <http://blog.sukad.com/>
5. Project Management Blog (Arabic): <http://blog-ar.sukad.com/>
6. CAM<sup>2</sup>P™ Website: <http://www.cam2p.com/>
7. Project Management Templates: <http://www.sukad.com/project-management-templates>

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One generation's transformation is the next's status quo. In the near future, people may soon think it's strange that devices ever had to be "plugged in." To obtain that status, there needs to be "The Shift".

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## Appendix C: List of Acronyms

AACE®	The Association for the Advancement of Cost Engineers, International AACE® International
ANSI	American National Standards Institute
BP	Best Practices
BRD	Basic Requirements Document
CAM <sup>2</sup> P™	Customizable and Adaptable Methodology for Managing Projects™
CII	Construction Industry Institute
COR	Close Out Report
CRP	Control Reference Point
FS	Feasibility Study
ICB	IPMA Competence Baseline
IPMA®	International Project Management Association
NGO	Non-governmental organization
PAD	Project Authorization Document
PBS	Project Breakdown Structure
PDP	Project Detailed Plan
PLC	Project Life Cycle / Product Life Cycle
PLS	Project Life Span
PM	Project Management, Project Manager
PM Plan	Project Management Plan
PMBOK®	A Guide to the Project Management Body of Knowledge, PMBOK® Guide
PMI	Project Management Institute
PMP	Project Management Plan but prefer to use PM Plan instead
PMP®	Project Management Professional
PMT	Project Management Team
RFP	Request for Proposal
SG	Stage Gate
SOW	Scope of Work / Statement of Work
SUKAD	SUKAD stands for Success Uniqueness Knowledge Attitude Development and is the name of the company co-founded by the author.
VIP	Value Improving Practices
WBS	Work Breakdown Structure

# End Sections

## Author Biography: Mounir A. Ajam

Mr. Ajam is an entrepreneur, author, speaker, coach, advisor, consultant, volunteer leader, and project management thought leader.

He is the author of '*The Inheritance, a Story about Friendship, Community, and Project Management, Redefining the Basics of Project Management*', and a series of e-books on project management.

He is a senior executive with close to three decades of outstanding global and practical experience in capital project industries such as engineering, construction, petroleum, utilities and project management. He has worked on projects worth billions of US dollars in North America, Europe, South East Asia, and West Asia.

Mr. Ajam is a co-founder and the Chief Executive Officer of SUKAD Group, a leading project management provider with offices in Lebanon and United Arab Emirates.

Mr. Ajam and SUKAD play quite an active role in the project management community through various professional activities that are open to community members at no cost. He is a volunteer servant leader. He is heavily involved with the project management community at the regional and global levels. Globally, he has served in different roles and capacities, such as serving on the Global Advisory Group to the Project Management Institute (PMI®) Registered Education Provider program and as a judge for various PMI® educational awards. He served on the 2008 PMI® EMEA (Europe-Middle East-Africa) Congress Project Action Team. He is also a graduate of the PMI Leadership Institute Master Class.

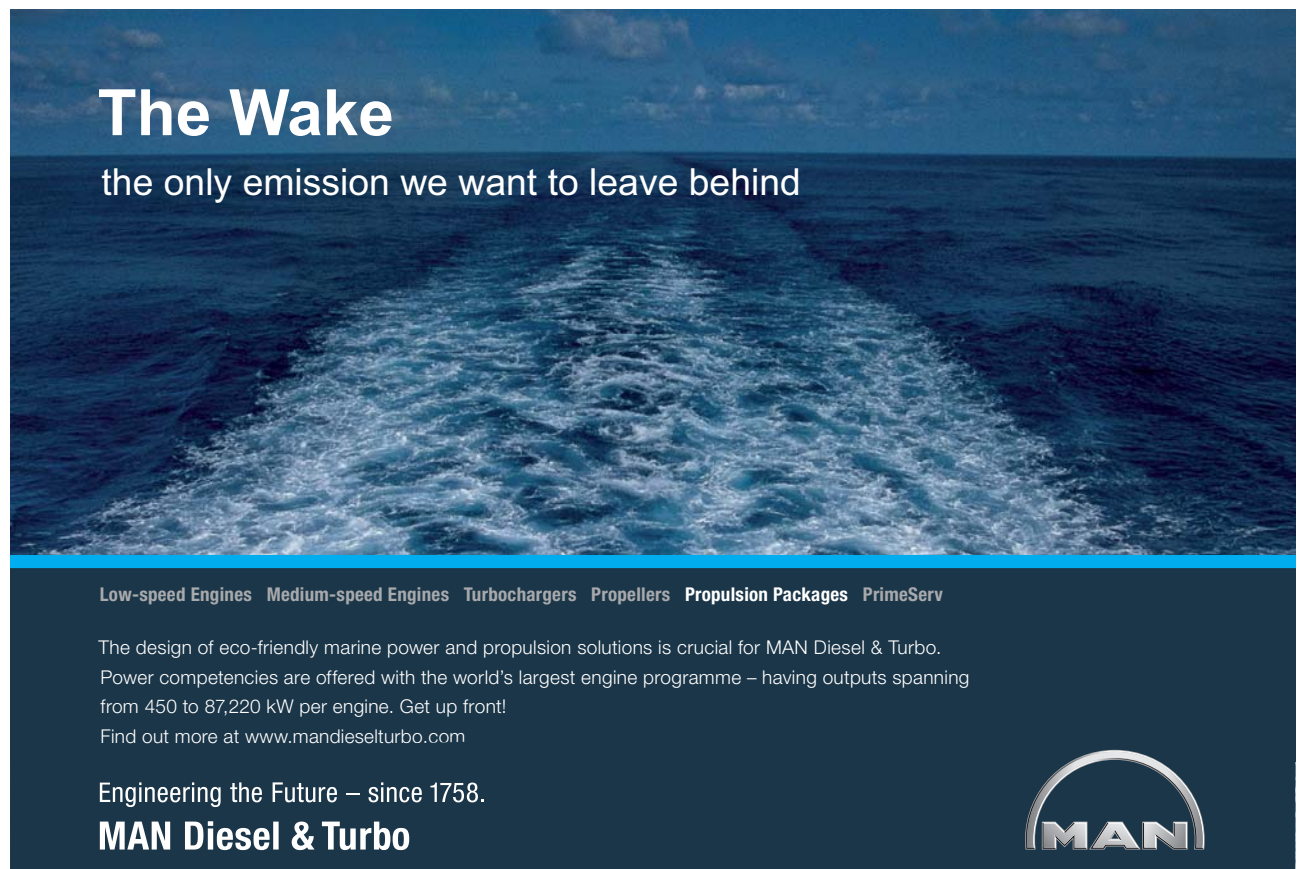
In West Asia, Mr. Ajam served on the board of directors for the PMI chapter in the Arabian Gulf. He led the effort to establish a PMI chapter in the United Arab Emirates. He also led the effort to establish the Global Project and Process Management Association (GPPMA) and served as its board chairperson for three years.

Mr. Ajam is an advocate of project management and recognizes its strategic value. He contributes to project management growth by publishing professional papers and articles on numerous platforms, such as PMI Congresses, Construction Week Magazine, Dubai Quality Group, DKV Experts Channel, PMForum.com, Wamda.com, and other publications. He is the principal author on the SUKAD blog (<http://blog.sukad.com>), in addition to a personal blog.

For more information about Mr. Ajam, please refer to his personal page at [www.mounirajam.com](http://www.mounirajam.com)

## About the Publisher

SUKAD Multimedia is a division of SUKAD Group with a focus on publishing project management related work. Through this division, SUKAD has published numerous e-books and books and continue to publish more, such as the e-book in your hand.




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# Endnotes

1. Project Management Foundation is actually the second edition of the Inheritance under a different name and with additional content.
2. All of these books are available in hardcover, paperback, or e-book format.
3. <http://multimedia.sukad.com/project-management-templates>
4. This general information could repeat for every template but we did not include the repetitive section.
5. Or Idea Owner.
6. To indicate whether this project is part of a program or not.
7. Non-Governmental Organizations
8. The sequence of the items listed below is not relevant and is not logically sequenced. Each organization can decide on the proper sequence that fits its environment.
9. Value Improving Practices, also known as Best Practices, are practices that go beyond the day-to-day common practices. If applied properly, they would typically lead to significant performance enhancements in term of cost, time, safety or other factors.
10. To be clear, when we refer to the project manager in the context of these templates and instructions it will typically include the project manager and project management team.
11. 'How', in this context, includes the what, who and where.
12. For better clarity on this point please refer to *Redefining the Basics of Project Management* book, chapters on control and change management.
13. For most of small projects, the project management team will consist of only the project manager.
14. For better clarity on this point please refer to *Redefining the Basics of Project Management* book, chapter the people aspects.
15. Short version of The Inheritance / Project Management Foundation