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All About Templates

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Introduction

Today we will discuss:

- What is a template?
- Who uses them?
- Where can I find them?
- How are they useful?



PM Template Definition

Merriam-Webster defines template as:

- “something that establishes or serves as a pattern”

A useful definition for PM Templates comes from the State of Oregon DHS PMO glossary:

- “A guideline for a document outline and its contents. A template is used to record the work activities, discussions, findings, and specification to help achieve a common understanding. In addition it is used to provide a consistent look and feel to the project documentation.”
- (http://www.oregon.gov/DHS/admin/pmo/publications/pmo_glossary.shtml)



PM Templates Users (1)

- Templates are commonly used by project teams in every industry and aspect of project management.
- Everyone on your project team, and most of your stakeholders, will benefit from one or more templates during the course of your project.
- However:
 - Template usage is not universal
 - There is no uniform format



Common Misunderstanding

- PMs who do not use templates often view them as a source of burdensome, bureaucratic overload
- The thinking goes like this:
 - I already have too much work to do, and now I have to do all this %^&*# paperwork
 - Now I'll never get the project done...
- **This is a mistake!** In actual fact, templates have exactly the opposite effect



Value of Project Templates

Project Management templates are an important Critical Success Factor

- Use of templates:
 - Makes it easy to find important project information
 - Improves communication
 - Makes project planning easier, faster and better
 - Supports use of a PM Methodology
 - Enhances customer satisfaction
 - Reduces project risk
 - Makes it easy to archive project data
 - **Saves you time and effort**



Consolidate Project Information

The project team does a LOT of planning in the course of any project. Without templates, this information tends to accumulate on yellow sticky notes, miscellaneous note pads, scraps of paper, etc.

- ◆ This is inefficient! It is very difficult to find the information you need in this scattered environment
 - ◆ This is dangerous! It is entirely too easy to miss important aspects of project planning without systemized documentation
- Project templates provide an easy way for you to document all of the information that you work so hard to collect



Improve Communication

- Templates provide an effective communication tool
- It can be very difficult for everyone on the project team to understand critical aspects of the project plan if they cannot access it as needed
- Without central documentation, it is likely that each team member's understanding of the project is different. This can lead to uncoordinated effort and wasted work



More Effective Planning

- Templates serve as a “prod” for effective planning
- When we use a template during planning we are much less likely to miss important aspects of the planning process.
- Templates serve as a guide to our planning efforts



Support of PM Methodology

- Templates reinforce effective Project Management process
- Well designed templates support and help carry out the Project Management Methodology of the organization.
- Since the Project Management Methodology effectively serves as the Quality Program of the project team, use of templates has a direct positive impact on project Quality.



Improve Customer Satisfaction

- Templates improve customer satisfaction
- When project agreements, decisions, plans and performance data are documented in a professional manner, it is easier to answer customer questions and the customer is more likely to feel that they are working with professionals.



Reduce Risk

- Templates reduce risk
- The chance of project success is greater when project staff do not have to rely on memory, planning is more comprehensive and everyone understands what the scope of the project is.
- Having a written record of agreed-upon baselines, plans and process eliminates many of the factors that push projects into trouble.



Easy Archive

- Templates provide an easy source of archive information for future projects
- History of prior projects is an important source of information during the project planning process. Use of templates ensures that important project information will be recorded in a uniform manner



Reduce the Workload

- **Templates actually save you time!**
- Contrary to what many think, when templates are used well they reduce work for the project manager.
- They provide a convenient place to record all that information that has been gathered during project planning
- They can be re-used. Once you have a template filled out, you may be able to use it again with only minor modifications
- They reduce the turmoil that can occur in any project when needed information cannot be found



PM Templates Sources (1)

Where do PM templates come from?

- Some organizations design their own
 - This can be very time-consuming
 - It is better to modify an existing template than to design a new one
- Templates may be obtained from any number of web sources, both free and at cost



PM Templates Sources (2)

Templates are available from a number of sites on the web. The following are worth a look:

- Texas:
 - <http://www.dir.state.tx.us/eod/qa/template.htm>
- Project Magazine:
 - <http://www.projectmagazine.com/>
- Gantthead:
 - <http://gantthead.com/Gantthead/templates/templateMain/1,1404,,00.html>
- Oregon DAS:
 - <http://oregon.gov/OHA/admin/bpm/pmo/index.shtml>
- Minnesota:
 - <http://mn.gov/oet/governance/planning-tools/>



CVR/IT Consulting Templates

CVR/IT Consulting has set out to produce a full suite of templates that may be used by any organization.

These include templates for diverse areas such as:

Project Definition

Risk Analysis

Change Control

Program Definition

Budgeting

PMO Charter

Reporting

Vendor Selection

Scope Planning

Business Analysis



Project Management Templates

You can download a full suite of Project Management templates from the CVR/IT Consulting website:

www.cvr-it.com

- All templates are fully customizable
- Easily add your logo and organization name
- Many templates are automated to minimize data entry
- A Project Management Methodology Document supports the templates and explains the context within which each template is used
- Fully PMBOK® and IIBA® compliant



Program, Portfolio & BA Templates

The CVR/IT suite of templates extends beyond the project. Templates are available to help you:

- Define a program of projects
- Guide an organization through difficult change
- Define a project portfolio
- Display key information in a Project Portfolio
- Create a charter for your Project Management Office
- Choose the best product or vendor for your initiatives
- Perform a Business Process Analysis
- Plan for a Requirements Engagement



CVR/IT Template Library

CVR/IT Consulting templates are used all over the globe

Check the CVR/IT library regularly for updates and additions.

<http://www.cvr-it.com>



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