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Nine Reasons Why Project Templates are Your Friend

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Project templates are ubiquitous. They are found for sale on numerous websites dedicated to project management topics, and are posted at no cost by many public sector organizations including both state and federal agencies. In fact, it is now possible to find a template for virtually any project purpose. That so many institutions have taken the time to post templates suggests that they must have some significant value. But what is that value? Why all the interest in templates?

Project templates, when properly designed, are one of the most potent tools that a project manager can use. I say potent because, for very little to no cost, the project manager obtains a device that can simultaneously save time, promote good communication and contribute significantly to project success. Have a look at what project templates can do for your project.

1. Templates save time

Yes, they do! In this world where we are overburdened with paperwork, as counterintuitive as this may be, we find time and time again that project managers actually save time by using templates. And when you think about it, this makes sense. You have so much information to gather, process and communicate that if you do not have a system to support you, your time can just slip through your fingers. Templates provide exactly that support system. If project plans are not recorded and available to everyone you can end up with non-stop arguments about what the project includes and how it was supposed to be done. That can lead to endless meetings and lots of headaches. So adding templates to your toolbox will not add work to your project. It will actually decrease it.

2. Templates safeguard information critical to the project

As Project Managers we do a LOT of planning during a project. We hold meetings with individuals and groups, analyze for best project approach and then develop plans for schedule, budget, risk and many other aspects of our projects. When we commit to memory the information gathered and the plans made, or when we record the information informally (e.g. on sticky notes), we can inadvertently place the project in jeopardy.

Human memory is tenuous at best. It is all too easy to forget an important step in the project schedule, or to lose track of the results of an important meeting. We can eliminate this risk by recording our project information in well designed templates. By having a more permanent record and making it available to stakeholders, everyone knows where to find information when it is needed. Further, as work is completed it is possible to compare progress against a recorded plan that everyone has agreed to. By building a record of project information we create an environment in which stakeholders and the project team can obtain full benefit from the time spent in analysis, planning efforts, monitoring activities and other project work.

3. Templates provide an effective communication tool

Once we have our critical project information recorded in an easy-to-read format, we can provide it to our stakeholders to get their input, obtain their approval or simply keep them well informed. If we post our documents in an easily accessible location (e.g. website or shared

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disk storage), it becomes much easier to distribute updates and there is less confusion about which is the document of record. Poor communication is one of the biggest causes of project failure. Proper use of well designed templates does much to eliminate this problem.

4. Templates reinforce effective Project Management process

Well designed templates support and help to execute our Project Management Methodology. A PM Methodology serves as the quality program of the Project Manager. Project templates embody the project process and serve as vehicles for the information used in that process. When well designed, templates guide us to perform our projects in a reproducibly successful manner.

5. 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. This is because the questions and checklists on each template remind us of all of the key questions that we should consider for each project topic. As an example, it is usually much easier to produce a Project Budget with a template that prompts us for potential sources of cost than by starting with a blank sheet of paper. The template can both save us time and make our time more productive.

6. Templates reduce project risk in several ways:

- They serve as a repository of project planning data so that the project team does not have to rely on memory
- They promote more comprehensive project planning so that the team is better prepared to perform the work of the project
- They encourage communication both within the team and between the team and stakeholders
- They provide a written record of agreed-upon baselines, plans and process thereby eliminating many of the factors that push projects into trouble.
- The written record also protects the institution from disaster in the event that individuals on the project leave (along with their knowledge capital)

7. 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. Archive of project documents ensures that important project information will be available to future projects. When templates are used, the information is stored in a uniform manner (i.e. every Risk Register has the same format) making it easier to find and use historical information.

8. Templates improve cross-project collaboration

It is much easier to find information in someone else's project if they use the same templates you do. You know exactly which documents to ask for and what information you can expect to find. In addition, if you need to assume management of another project manager's project, your job is much, much easier if they are using templates that you already know.

9. 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. Project documents based on well designed templates make a good impression on stakeholders, and good impressions can have a lasting and beneficial impact on your project.

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So there you have it; nine reasons that project templates are a great tool for you to use. They are available from many sources and many are free, although quality may vary greatly from one source to the next. Be certain to choose the templates that best fit your requirements, modify them as needed, and then put them to work for you. If you do, you will become one of the tens of thousands of project managers who have made project templates an integral part of every project they do.

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CVR/IT Consulting LLC provides a complete Project Template Library, available here:

http://www.cvr-it.com/PM_Templates/

These templates were designed by Dr. Gary J. Evans, President of CVR/IT Consulting LLC. The Template Library is currently used in over 20 countries and the templates are widely known for their careful design, ease of use and low cost.

For information on other services provided by CVR/IT Consulting see <http://www.cvr-it.com>