

Templates from

Project Charter Template

1. **Vision:** Concise and compelling idea behind the project
2. **Drivers, Constraints, and Floats:** What's driving the project, what's constraining the project, and where you have freedom to organize the project as you need.
3. **Goals:** What you might want to accomplish with the project, but not required that you do so
4. **Success Criteria:** Capabilities your product will have at the end of the project
5. **ROI Estimate:** Potential return from your project (only if your organization requires it)

See the discussion in *Write a Project Charter to Share These Decisions*, page 11 for more details.

Project Driver Matrix

Project Priority	Rank
Release date	
Feature set	
Low defects	
Cost to release	
People and their capabilities	
Work environment	

See the discussion in *Decide on a Driver for Your Project*, p. 7 for help in defining this matrix for your project.

Project Plan

1. **Product purpose:** The value of this product to your organization
2. **History:** If this is a follow-on release, briefly describe the product history
3. **Release Criteria:** The few vital product deliverables of the product.
4. **Goals:** Consider project, product, or team goals.
5. **Proposed schedule:** Major milestones only. If you have alternative proposals for the project, explain the schedule for each option
6. **Project staffing:** Curve of who will be on the project when
7. **Risk list:** Include the risk list here or a pointer to it

See the discussion in *Develop a Project Plan Template*, p. 19 for more details.

Project Risk Matrix

Numbered Risk	Risk Description	Probability	Severity	Exposure	Trigger Date	Mitigation Plan
<i>Number each risk</i>	<i>Name the risk with a phrase or sentence</i>	<i>Probability the risk will occur</i>	<i>The severity if the risk occurs</i>	<i>Multiply the probability times severity</i>	<i>Date by which you need to act</i>	<i>Plan to deal with the risk</i>
1	The potential problem	High, medium or low	High, medium or low	(M, H)	Make sure this date is not too late to solve the potential problem.	Say as much as you need to so your readers understand your plan.

See the discussion of the risk matrix on p. 25, *Develop a Project Risk List*, and following for more examples of and information about risks.

System Test Strategy

1. **Product revision and overview:** Differentiate this project from any others in system test
2. **Product history:** Include defect or technical debt history
3. **Features to be tested:** Itemize the features to be tested
4. **Features Not to be tested:** Itemize the features that will not be tested
5. **Configurations included and excluded:** Make a list of all configurations, hardware and software
6. **Environmental requirements:** Discuss the necessary testing environment
7. **System test approach:** Discuss how you will integrate testing into the project
8. **System test entry criteria:** How the whole team will know when the system is ready for system test
9. **System test exit criteria:** How the whole team will know when the system test is complete
10. **Other documents referenced:** You may need to reference the project plan or schedule or risk list to make your strategy clear

See the discussion in *Define a Test Strategy for Your Project*, starting on p. 273 for more details.

Weekly Status Report

Status report for <person> for week ending mm/dd/yy

Accomplishments: Bullets or a brief paragraph (two to three sentences) of accomplishments for the past week.

Future milestones:

Task Description	Planned Date	Expected Date	Actual Date
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If you or your team member discovers there are organization forces preventing him or her from finishing work when estimated, add another column, "Number of changes to estimate" and track that along with why.

Obstacles: Concerns or issues that would prevent the team member from making progress.

See the discussion in the chapter *Managing Meetings*, p 183, for general meeting information. Read more about how to obtain project status in the section *Determining Project Status*, p. 188. See the sections *One-on-One Meetings*, p.190 for information on how to have project-based one-on-one meetings and why you should never have serial status meetings in *Never Conduct Serial Status Meetings*, p. 185.

Project Team Agenda

Agenda for (project) team meeting, date, time, location

1. Expected attendees:
2. Major milestone review.
3. Problem of the week:
4. Any obstacles?
5. New business?
6. Review old action items:
7. Next Meeting:
8. Pending items/parking lot

For more information, see *Project Team Meetings*, on p. 194.

Beta Test Plan

1. **Beta purpose:** Explain why you're conducting a beta test
2. **Beta customer selection:** Explain how you're selecting beta customers
3. **Beta entry criteria:** How you know the product will be ready for beta test
4. **Beta exit criteria:** How you know the beta test is done
5. **Overall beta schedule:** Major milestones for the beta part of the project

See the discussion in *Managing Beta Releases*, p. 290 for more details.

Program Plan

1. **Overview:** The purpose behind this product
2. **Features:** Significant program features
3. **Program requirements:** The program's requirements (the program's drivers, constraints, floats—not the product's requirements)
4. **Market evaluation and marketing plan:** Explain how this product will make money or otherwise contribute to the organization
5. **Sales plan:** How the organization will sell the product
6. **ROI and product lifetime:** Explain current and future costs and revenue
7. **Schedule overview:** Major milestones for the program
8. **Staffing curve:** Who's needed when
9. **Training plan:** Training for internal or external people
10. **Service/support plan:** How will your organization support or service the product
11. **Other plans:** Include other plans as needed. Some examples are hardware, operations, deployment.

See the discussion in *When Your Project is a Program*, p. 279 for more details.