

The Project Template Selection Guide

Choose the right document for the decision in front of you.

18 templates. Five stages. Clear choices.

Purpose | When to use it | Advantages | Disadvantages

1

Initiation

Authorize and justify the project

2

Planning

Define and organize the work

3

Execution / Control

Resolve problems and control delivery

4

Reporting / Governance

Communicate progress and record decisions

5

Closure

Transfer ownership and close formally

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How to use this book

A template earns its place when it supports a decision or action.

1. START WITH THE NEED

Use the quick selector on pages 3-4. Find the question you need to answer, then open the linked profile. Each profile includes suggested fields, ownership, timing, benefits, limitations and a short example.

2. MATCH THE EFFORT TO THE PROJECT

Use a short document or shared table when that provides enough control. Add detail for complex dependencies, multiple suppliers, major investment or formal assurance. Follow your organization's required approvals and records.

3. TREAT THE STAGES AS AN ORGANIZING AID

The image places each template where it is commonly introduced or most visible. Reporting and governance run across the project. Stakeholders, risks, issues, decisions and lessons should be maintained whenever relevant. Plan handover early.

4. KEEP ONE AUTHORITATIVE RECORD

A template can be a document, spreadsheet or a view in your project system. Assign an owner, review rhythm, version or as-of date, and a clear place to find the current record. Link related IDs instead of repeatedly copying entries.

WHAT THIS BOOK ADDS TO THE IMAGE

All 18 template types from the supplied image are covered. The minimum fields, examples, suggested ownership and selection judgments are practical guidance, not a mandatory standard. Examples use a fictional community learning centre and illustrative currency units.

Find it quickly	Pages
Stage-by-stage selector	3-4
The 18 template profiles	5-22
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Selection worksheet, glossary and sources	28-30

Start and plan the project

Click a template name to open its detailed guide.

Stage / need	Choose this template	Page
Initiation: authorize the project	Project Charter	5
Initiation: justify value and investment	Business Case	6
Initiation: identify affected people	Stakeholder Register	7
Planning: agree delivery boundaries	Scope Statement	8
Planning: organize all agreed work	Work Breakdown Structure (WBS)	9
Planning: sequence work and forecast dates	Schedule Template	10
Planning: explain expected costs	Cost Estimate Template	11
Planning: anticipate uncertainty	Risk Register	12

THE USEFUL SEQUENCE

Usually, test the business justification, establish authority, clarify scope, break down the work, and estimate the time and cost together. Identify stakeholders and risks early. Repeat these steps as the project becomes clearer; they are not a rigid document production line.

BEFORE SUBSTANTIAL DELIVERY BEGINS

Can the team explain the objective, acceptance criteria, boundaries, people, cost, dates and major uncertainty? A completed form is useful only if the underlying agreement and evidence exist.

Deliver, govern and close

Use the current problem to choose the right record.

Stage / need	Choose this template	Page
Execution / Control: resolve a current problem	Issue Log	13
Execution / Control: follow up commitments	Action Log	14
Execution / Control: assess a controlled change	Change Request / Change Log	15
Execution / Control: track results and acceptance	Deliverables Tracker	16
Reporting / Governance: summarize progress	Status Report	17
Reporting / Governance: preserve a choice and rationale	Decision Log	18
Reporting / Governance: run a purposeful meeting	Agenda / Minutes Template	19
Closure: transfer operational responsibility	Handover Checklist	20
Closure: turn experience into improvement	Lessons Learned Log	21
Closure: authorize the formal end	Closure Report	22

THESE RECORDS WORK TOGETHER

A late delivery may create an issue, several actions, a change request and a decision. Use linked IDs so the connection is clear. Do not treat the same event as four unrelated problems.

Project Charter

Are we authorized to do this project?

WHAT IT IS FOR

A short agreement that establishes the project, its purpose, high-level boundaries and the authority of the project manager. It creates a shared starting point for detailed planning.

CHOOSE IT WHEN

Use at initiation, before substantial resources are committed. Use a short charter for a small project; expand it when several organizations, sponsors or major commitments are involved.

MINIMUM USEFUL FIELDS

Purpose; measurable objectives; high-level scope and exclusions; key deliverables; target milestones; funding limit; assumptions; major risks; sponsor; project manager authority; approval and date.

Owner / approval: Project manager drafts with the sponsor. The sponsor or authorized body approves it.

Review / update: Reference throughout delivery. Revisit when the purpose, authority or major boundaries change; retain approval history.

ADVANTAGES

Clarifies who may lead and decide.

Reduces conflicting expectations at the start.

DISADVANTAGES / LIMITATIONS

An overly broad charter allows different interpretations.

Heavy approval processes can delay a small project.

WORKED EXAMPLE

Community centre: deliver 10 operational computers and a booking service within 12 weeks. Sponsor authorizes planning within an illustrative 20,000-unit funding limit; major changes need sponsor approval.

USE ALONGSIDE

Business Case explains why the investment is worthwhile. Scope Statement adds the detailed delivery boundaries.

Selection rule: Choose this when authorization or direction is unclear. It does not replace a detailed plan.

Business Case

Is this project worth doing?

WHAT IT IS FOR

A reasoned comparison of the proposed investment with alternatives. It explains expected benefits, costs, risks and the conditions under which the project remains worthwhile.

CHOOSE IT WHEN

Prepare before an investment decision. Include a realistic do-nothing or minimum-change option where meaningful. Reassess at funding gates and when major assumptions change.

MINIMUM USEFUL FIELDS

Problem or opportunity; options; expected benefits and measures; costs over an agreed period; assumptions; risks; constraints; recommendation; benefits owner; decision criteria; review date.

Owner / approval: Sponsor or business owner owns the justification; the project manager and specialists support the analysis.

Review / update: At investment decisions and major changes. Track benefits after delivery through the named business owner.

ADVANTAGES

Connects delivery to a useful outcome.

Makes options and trade-offs visible to decision makers.

DISADVANTAGES / LIMITATIONS

Optimistic assumptions can make weak proposals look attractive.

Detailed analysis takes time and may become stale.

WORKED EXAMPLE

Compare a centre, rented training rooms and online-only sessions. Consider setup and running costs, accessibility and expected learner participation; test whether the preferred option still works if attendance is lower.

USE ALONGSIDE

Feeds the Charter. Cost Estimate supports the figures. Closure Report passes future benefits reviews to the business owner.

Selection rule: Choose this when funding or strategic value must be justified. Approval should depend on credible assumptions.

Stakeholder Register

Who affects the project, and who is affected?

WHAT IT IS FOR

A living list of people and groups whose needs, decisions or participation matter. It supports engagement, rather than merely storing names and contact details.

CHOOSE IT WHEN

Start during initiation. Extend the list as you discover users, operational teams, suppliers, funders and people affected by the change. Include people with little formal power but substantial impact.

MINIMUM USEFUL FIELDS

Person or group; role; interest and needs; influence or impact; engagement approach; preferred channel; relationship owner; next contact; relevant decisions; last review.

Owner / approval: Project manager coordinates; team members maintain relationships. Limit access to sensitive personal or evaluative information.

Review / update: At each stage and when people, responsibilities or concerns change. Validate assumptions through conversation.

ADVANTAGES

Helps prevent important voices being missed.

Supports targeted communication and timely decisions.

DISADVANTAGES / LIMITATIONS

Judgments about influence can be biased or outdated.

A contact list alone does not create engagement.

WORKED EXAMPLE

Adult learners need simple booking; the accessibility representative reviews the service; volunteers need training; the service owner accepts handover. Give each group a named contact and next engagement date.

USE ALONGSIDE

Feeds meeting invitations, communications and acceptance discussions. Use the Decision Log to record formal choices.

Selection rule: Choose this when people or expectations are complex. Keep the information respectful, relevant and current.

Scope Statement

Exactly what will we deliver?

WHAT IT IS FOR

A description of the agreed project boundaries: included results, excluded work and the conditions for acceptance. It gives the team a shared basis for judging requests.

CHOOSE IT WHEN

Develop during planning after the charter. Use more detail when work crosses team or supplier boundaries, or when misunderstandings would cause significant rework.

MINIMUM USEFUL FIELDS

Objectives; deliverables; requirements summary or references; inclusions; exclusions; acceptance criteria; constraints; assumptions; interfaces; approver; version and approval date.

Owner / approval: Project manager coordinates with users, delivery specialists and the authorized scope approver.

Review / update: Review before baselining and when a scope change is approved. Preserve the baseline and explain revisions.

ADVANTAGES

Reduces ambiguity and uncontrolled expansion.

Makes acceptance and supplier discussions more precise.

DISADVANTAGES / LIMITATIONS

Early detail can create false certainty in discovery work.

A long document may still hide unclear acceptance criteria.

WORKED EXAMPLE

Included: 10 configured computers, booking pilot and volunteer training. Excluded: a second location. Acceptance: agreed tests pass and the service owner confirms readiness against recorded criteria.

USE ALONGSIDE

Feeds WBS, Schedule and Cost Estimate. Change Requests assess proposed alterations. Deliverables Tracker records acceptance evidence.

Selection rule: Choose this when boundaries or acceptance are disputed. In evolving work, detail the next release and state what remains open.

Work Breakdown Structure

Have we included all the agreed work?

WHAT IT IS FOR

A hierarchy that breaks the project scope into manageable deliverables and work packages. It organizes the total work; it does not show the sequence or timing by itself.

CHOOSE IT WHEN

Use during planning when scope needs to be checked, estimated or assigned. A short outline may be sufficient for a small project; a dictionary helps clarify larger work packages.

MINIMUM USEFUL FIELDS

WBS code; deliverable or work package; description; scope boundary; acceptance reference; owner; assumptions; dictionary notes. Include management work and avoid counting the same work twice.

Owner / approval: Project manager facilitates; the people delivering the work build and validate the breakdown.

Review / update: When scope is defined or approved changes affect the breakdown. Check that child items cover their parent without overlap.

ADVANTAGES

Exposes missing work and clarifies ownership.

Provides a common basis for estimates and tracking.

DISADVANTAGES / LIMITATIONS

Too much detail creates maintenance effort.

Treating the WBS as a dated task list confuses scope with sequence.

WORKED EXAMPLE

1. Centre delivery: 1.1 Room readiness; 1.2 Computer service; 1.3 Booking service; 1.4 Volunteer readiness; 1.5 Project management. Break “Computer service” into defined work packages before estimating activities.

USE ALONGSIDE

Scope Statement defines the boundary. Schedule adds activities and dependencies. Cost Estimate maps costs to work packages.

Selection rule: Choose this to check scope completeness. Use a schedule to answer when the work will happen.

Schedule Template

What happens when, and what drives the finish?

WHAT IT IS FOR

A time-based plan connecting activities, dependencies, resources and milestones. It should distinguish the approved reference plan from current forecasts and actual progress.

CHOOSE IT WHEN

Use when dates, handoffs or resource availability matter. A milestone list can suit a small project; linked scheduling is more useful when many dependencies affect delivery.

MINIMUM USEFUL FIELDS

Activity ID; work package; duration; predecessor; owner or resource; calendar; baseline dates; forecast dates; actual dates; progress evidence; milestone; dependency notes.

Owner / approval: Project manager or planner maintains it with estimates and updates from the people doing the work.

Review / update: At an agreed rhythm and after material changes or delays. Assess effects on downstream work and resource availability.

ADVANTAGES

Makes timing conflicts and dependencies visible.

Supports realistic forecasts and recovery options.

DISADVANTAGES / LIMITATIONS

A detailed chart can suggest accuracy that estimates do not support.

An unmaintained schedule quickly becomes misleading.

WORKED EXAMPLE

Room preparation: 5 working days. Computer setup: 2 days after room readiness and delivery. User testing: 1 day after setup. Confirm calendars and people before promising the final date.

USE ALONGSIDE

WBS defines work; Risk Register records uncertainty; Change Log records approved baseline changes; Status Report summarizes forecasts.

Selection rule: Choose this when sequence or dates matter. Show assumptions and forecast movement rather than silently replacing the baseline.

Cost Estimate Template

What will the agreed work probably cost?

WHAT IT IS FOR

A structured calculation of expected costs with the reasoning behind them. An estimate is a forecast; an approved budget is the authorized funding or spending plan.

CHOOSE IT WHEN

Use before funding decisions and during planning. Use ranges when uncertainty is high, then refine with supplier quotes and better scope information.

MINIMUM USEFUL FIELDS

Item or work package; quantity; rate; amount; currency; estimate date; source; assumptions; exclusions; uncertainty or range; contingency basis; time period; estimate owner.

Owner / approval: Project manager coordinates inputs from work owners, finance and procurement. Funding approval follows organizational authority.

Review / update: When scope, rates, quotes, exchange assumptions or delivery plans change. Explain the basis of each new estimate.

ADVANTAGES

Makes cost drivers and assumptions visible.

Supports options, funding decisions and later variance analysis.

DISADVANTAGES / LIMITATIONS

False precision can hide uncertainty.

Missing running costs, dependencies or contingency can understate the need.

WORKED EXAMPLE

10 computers x 800 units = 8,000; setup 20 hours x 50 = 1,000. Subtotal: 9,000. Add other scope and justified risk allowances separately; state whether tax and ongoing support are included.

USE ALONGSIDE

Business Case uses lifecycle costs. Schedule affects resource costs. Status Report compares actual cost plus remaining forecast with the approved budget.

Selection rule: Choose this to explain a cost forecast. Keep amounts, currency, scope and estimate date consistent.

Risk Register

What might affect the project?

WHAT IT IS FOR

A record of uncertain events that could affect objectives, negatively or positively, together with owners and planned responses. It supports action before uncertainty becomes a problem.

CHOOSE IT WHEN

Start early and maintain throughout delivery. Use when a possible event could materially affect value, scope, time, cost, quality or people.

MINIMUM USEFUL FIELDS

Risk ID; cause-event-effect statement; probability; impact; rating criteria; owner; response; response action and due date; trigger; residual exposure; review date; status.

Owner / approval: Project manager coordinates reviews; each risk owner monitors the risk and drives the agreed response.

Review / update: Review at a cadence matching exposure, and after major decisions or events. Escalate beyond agreed authority or tolerance.

ADVANTAGES

Encourages early prevention and preparedness.

Directs attention to the most important uncertainty.

DISADVANTAGES / LIMITATIONS

Scores can be subjective or falsely precise.

Long lists without owners and responses provide little protection.

WORKED EXAMPLE

R-01: if the supplier misses its confirmed date, computer setup may slip. Owner: Leo. Response: weekly confirmation and a checked alternative. Trigger: forecast arrival exceeds available schedule float.

USE ALONGSIDE

If the event happens, create or link an Issue Log entry and update the risk status. Response tasks belong in the Action Log or delivery plan.

Selection rule: Choose this for uncertainty. Use an Issue Log for a current problem and record links between related entries.

Issue Log

What problem needs resolving now?

WHAT IT IS FOR

A structured list of current problems, obstacles or unresolved matters requiring attention. It makes impact, accountability, escalation and resolution evidence visible.

CHOOSE IT WHEN

Use as soon as a problem needs coordinated resolution. Start during initiation if needed; issues are not limited to the execution stage.

MINIMUM USEFUL FIELDS

Issue ID; description and date raised; impact; priority; owner; agreed action; due date; escalation; linked risk/change/decision; status; resolution evidence; closed date.

Owner / approval: The assigned issue owner resolves it. The project manager monitors progress and escalates when necessary.

Review / update: Review urgent issues promptly and open issues at delivery reviews. Close only when the agreed resolution is verified.

ADVANTAGES

Prevents problems being lost in email or meetings.

Supports clear escalation and follow-through.

DISADVANTAGES / LIMITATIONS

Can become a complaint list without concrete action.

Duplicating every ordinary task creates noise.

WORKED EXAMPLE

I-03: supplier confirms a three-day delay. Impact: setup forecast at risk. Owner: Leo. Due: today. Action: check partial delivery and alternatives; escalate options and impacts to Maya.

USE ALONGSIDE

Action Log tracks follow-up tasks. Change Request is needed if the proposed resolution requires an authorized baseline or commitment change.

Selection rule: Choose this for an existing problem. Describe its effect and the next decision or action, not only the symptom.

Action Log

Who will do what by when?

WHAT IT IS FOR

A record of specific commitments and follow-up tasks, especially those arising from meetings, issues or decisions. It closes the gap between discussion and action.

CHOOSE IT WHEN

Use when work is being forgotten or commitments cross team boundaries. If a shared task system already provides the same control, use that system rather than copying it.

MINIMUM USEFUL FIELDS

Action ID; clear verb-based action; owner; due date; source or linked item; priority; status; completion evidence; date completed.

Owner / approval: Each named owner performs the action. A coordinator or project manager maintains visibility and checks overdue work.

Review / update: At team check-ins and when due dates approach. Update immediately when completed or blocked; retain the reason for changed commitments.

ADVANTAGES

Makes responsibilities and deadlines explicit.

Provides a simple way to check follow-through.

DISADVANTAGES / LIMITATIONS

Duplicate task lists drift apart.

A large action list gives little insight into dependencies or overall delivery.

WORKED EXAMPLE

A-07: "Leo will obtain written confirmation of partial delivery by Thursday 12:00." Source: I-03. Completion evidence: supplier confirmation attached. "Chase supplier" alone is too vague.

USE ALONGSIDE

Links to Issue, Risk and Decision Logs. Schedule handles dependency-driven delivery work; the Action Log can reference scheduled task IDs.

Selection rule: Choose this for concrete commitments. Give each action one clearly accountable owner and an observable finish.

Change Request / Change Log

Should we alter an agreed commitment?

WHAT IT IS FOR

A Change Request sets out a proposed change and its impact for a decision. The Change Log tracks requests, decisions and implementation across the project.

CHOOSE IT WHEN

Use when a proposal changes approved scope, dates, cost, quality or another controlled commitment. Apply agreed authority levels; routine work choices need not all become formal requests.

MINIMUM USEFUL FIELDS

Request ID; requester and date; reason; proposed change; options; scope/time/cost/quality/risk impact; recommendation; decision authority; decision and date; implementation owner; affected versions.

Owner / approval: Anyone may propose a change. The project manager coordinates assessment; the authorized person or board decides.

Review / update: Triage on receipt; decide before committing to changed work. Verify implementation and communicate updated baselines after approval.

ADVANTAGES

Makes trade-offs and authorization visible.

Creates a traceable history of what changed and why.

DISADVANTAGES / LIMITATIONS

Excessive process can slow useful adaptation.

Informal commitments made before approval undermine control.

WORKED EXAMPLE

CR-02: add five computers. Assess space, power, network, cost and date impacts. Sponsor approves, rejects or defers the request. Log the decision even if no work is authorized.

USE ALONGSIDE

Update Scope, WBS, Schedule, Cost Estimate and Deliverables Tracker as affected. Decision Log may reference the formal approval.

Selection rule: Choose this for controlled changes. A request is not approval, and approval is not proof of implementation.

Deliverables Tracker

Which results are ready and accepted?

WHAT IT IS FOR

A list of promised outputs and their delivery, review and acceptance state. It focuses on evidence that results meet expectations, rather than just task completion.

CHOOSE IT WHEN

Use when several outputs or recipients need coordinated acceptance. Set it up during planning, when acceptance criteria and reviewers can still shape the work.

MINIMUM USEFUL FIELDS

Deliverable ID; description; scope reference; owner; reviewer or accepter; criteria; planned and forecast dates; status; review evidence; defects or conditions; acceptance date.

Owner / approval: Delivery owners update progress. The designated customer, product or business representative accepts within their authority.

Review / update: At delivery reviews and each submission or acceptance event. Keep “produced,” “reviewed” and “accepted” distinct.

ADVANTAGES

Makes readiness and acceptance gaps visible.

Supports handover with a clear evidence trail.

DISADVANTAGES / LIMITATIONS

Percent-complete claims can be subjective.

It may duplicate a backlog or quality system unless linked carefully.

WORKED EXAMPLE

D-02: booking pilot. Owner: Asha. Criteria: booking saved once, confirmation displayed and cancellation tested. State: review pending. Acceptor: service owner. Link test results before marking accepted.

USE ALONGSIDE

Uses Scope acceptance criteria and feeds Status Report, Handover Checklist and Closure Report. Record significant defects in the appropriate issue or defect system.

Selection rule: Choose this when acceptance is hard to see. A completed task does not automatically mean an accepted deliverable.

Status Report

Where are we, and what needs attention?

WHAT IT IS FOR

A concise, dated snapshot of progress, forecast and the decisions or help needed. It should let its audience act without reconstructing the project from raw logs.

CHOOSE IT WHEN

Use at the reporting rhythm agreed with the sponsor and team. Increase frequency when exposure or decision needs rise, rather than reporting out of habit.

MINIMUM USEFUL FIELDS

As-of date; overall status with reason; accepted results; next milestones; baseline versus forecast dates; cost forecast; top risks/issues; changes; decisions required; owners and deadlines.

Owner / approval: Project manager assembles verified inputs. Delivery and finance owners confirm their figures; sponsor or governance group uses the report.

Review / update: Publish on an agreed cadence with a consistent reporting date. Escalate urgent matters between reports.

ADVANTAGES

Gives decision makers a shared view.

Reveals trends and directs attention to exceptions.

DISADVANTAGES / LIMITATIONS

Color ratings can hide subjective judgments.

Manual reporting can consume time and repeat stale information.

WORKED EXAMPLE

As of week 6: amber because delivery delay threatens setup. Budget 20,000 units; actual 8,000 plus remaining estimate 13,000 gives forecast 21,000. Decision: choose a recovery option by Friday.

USE ALONGSIDE

Summarizes the current Schedule, cost forecast, Deliverables Tracker and key logs. Link to details rather than copying every entry.

Selection rule: Choose this for communication and decisions. Include the reason behind each rating and the action required.

Decision Log

What was decided, by whom, and why?

WHAT IT IS FOR

A durable record of significant choices, their rationale and the authority behind them. It helps people understand the current direction and avoids repeated debate.

CHOOSE IT WHEN

Use from initiation onward for choices that affect commitments, design, delivery or governance. Record decisions made outside meetings as well as inside them.

MINIMUM USEFUL FIELDS

Decision ID; question; options considered; decision; rationale; decision maker; date; conditions; affected items; communication; follow-up actions; superseded decision reference.

Owner / approval: The decision maker confirms the choice and authority. The project manager or coordinator maintains the record.

Review / update: Capture promptly; revisit conditions and communicate changes. Preserve earlier decisions and mark superseded entries clearly.

ADVANTAGES

Preserves reasoning when people change.

Reduces contradictory instructions and repeated discussion.

DISADVANTAGES / LIMITATIONS

Poorly written rationales can mislead later readers.

Logging every trivial choice creates unnecessary administration.

WORKED EXAMPLE

DEC-04: sponsor approves temporary loan equipment to protect opening, subject to compatibility tests. Reason: lower disruption than delaying training. Leo owns the test action; the record links to CR-03.

USE ALONGSIDE

Meeting Minutes provide context. Change Log records formal requests and implementation. Action Log tracks resulting commitments.

Selection rule: Choose this when the reason and authority for a choice must remain clear. Discussion is not a recorded decision.

Agenda / Minutes Template

How will a meeting produce useful outcomes?

WHAT IT IS FOR

An agenda prepares participants for focused discussion and decisions. Minutes record the outcomes, decisions and actions after the meeting, without needing a word-for-word transcript.

CHOOSE IT WHEN

Use for steering meetings, workshops and coordination sessions where decisions or commitments matter. A short agenda may be enough for a brief working session.

MINIMUM USEFUL FIELDS

Purpose; date; chair; attendees; required decision makers; agenda items; time boxes; pre-reading; decisions requested; discussion summary; decisions; actions with owners and dates.

Owner / approval: Chair owns the purpose and agenda. An assigned recorder drafts minutes; decision makers and action owners confirm the relevant outcomes.

Review / update: Share the agenda and evidence before the meeting. Circulate minutes promptly, resolve corrections and update linked logs.

ADVANTAGES

Improves preparation and meeting focus.

Makes decisions and follow-up commitments visible.

DISADVANTAGES / LIMITATIONS

Long narrative minutes bury the important points.

Poor attendance or missing authority can prevent real decisions.

WORKED EXAMPLE

Item: choose recovery option for I-03, 15 minutes. Required: sponsor, Maya and Leo.

Pre-read: options and impacts. Minutes record the selected option, rationale, authority and follow-up date.

USE ALONGSIDE

Decision and Action Logs become the ongoing records. Status Report and Change Requests often provide pre-reading for steering meetings.

Selection rule: Choose this when a meeting has a clear outcome. Cancel or redesign meetings that have no decision, coordination or learning need.

Handover Checklist

Can the receiving team operate what we delivered?

WHAT IT IS FOR

A readiness checklist for transferring outputs, knowledge and responsibility to an operational owner or customer. It makes practical ownership visible at the point of transition.

CHOOSE IT WHEN

Plan the checklist early and complete it progressively. Use for each release or transfer, not only at the final project closure.

MINIMUM USEFUL FIELDS

Item; deliverable; acceptance evidence; receiving owner; training; documentation; access transfer; support arrangements; known defects; outstanding actions; readiness decision; acceptance date.

Owner / approval: Project manager coordinates with delivery leads and the receiving service owner. The receiving owner confirms operational readiness.

Review / update: At transition rehearsals, releases and final transfer. Open items need explicit acceptance, an owner, due date and support arrangement.

ADVANTAGES

Reduces the chance of unsupported or unusable outputs.

Clarifies who owns the service after the project.

DISADVANTAGES / LIMITATIONS

Tick-box completion can mask poor readiness.

Late involvement of operations creates rushed training and gaps.

WORKED EXAMPLE

Before opening: service owner confirms access, support contacts, volunteer training and recovery instructions. D-02 acceptance is linked. A minor open item is transferred with an agreed owner and due date.

USE ALONGSIDE

Deliverables Tracker supplies acceptance evidence. Issue Log supplies known problems. Closure Report confirms the transfer and remaining obligations.

Selection rule: Choose this for a transfer of responsibility. Do not mark an item complete without the required evidence or receiving agreement.

Lessons Learned Log

What should we repeat or change next time?

WHAT IT IS FOR

A record of useful learning from events, outcomes and experiments. It turns experience into specific improvements that someone can apply and evaluate.

CHOOSE IT WHEN

Start during the project and capture lessons near the event. Review at milestones, retrospectives and closure; do not rely on memory at the end.

MINIMUM USEFUL FIELDS

Context; event; observed result; contributing causes; what worked; improvement recommendation; intended audience; owner; due date; evidence of adoption or effect.

Owner / approval: The team contributes. The project manager facilitates; named improvement owners put relevant lessons into practice.

Review / update: After significant events and at regular learning reviews. Revisit whether agreed improvements were adopted and helped.

ADVANTAGES

Preserves useful knowledge across projects.

Can improve the current project before it finishes.

DISADVANTAGES / LIMITATIONS

Blame discourages honest contributions.

A repository of vague lessons may never influence work.

WORKED EXAMPLE

Observation: supplier uncertainty was discovered too late. Improvement: confirm lead time before the baseline and check at agreed intervals. Owner: procurement lead. Test on the next order and review whether surprises fall.

USE ALONGSIDE

Issue and Risk Logs provide context. Action Log tracks improvement tasks. Closure Report highlights the most reusable lessons.

Selection rule: Choose this to change future behavior. Replace “communicate better” with a specific practice, owner and review.

Closure Report

Can the project formally end?

WHAT IT IS FOR

A final account of what was delivered, accepted, spent and learned, with remaining responsibilities clearly transferred. It supports the authorized decision to close the project.

CHOOSE IT WHEN

Use at normal completion, early termination or a formally closed phase. Closure can be appropriate even when not every original objective was achieved, if the outcome and consequences are documented.

MINIMUM USEFUL FIELDS

Objectives versus results; accepted and undelivered scope; final schedule/cost; variance reasons; handover evidence; contract/finance status; residual risks and actions; lessons; benefits owner; closure approval.

Owner / approval: Project manager prepares it with delivery, operational and finance inputs. Sponsor or authorized body approves closure.

Review / update: Once at closure, with later corrections controlled. Arrange future benefit reviews with the business owner rather than leaving them with a closed team.

ADVANTAGES

Creates a clear end and releases resources.

Preserves accountability for unfinished obligations and benefits.

DISADVANTAGES / LIMITATIONS

Can become a ceremonial report with weak evidence.

Pressure to close may hide unresolved acceptance or ownership gaps.

WORKED EXAMPLE

Record actual outcomes, accepted deliverables, cost and schedule variances. Transfer remaining support tasks to the service owner. Sponsor approves closure; attendance benefits are reviewed after three months.

USE ALONGSIDE

Draws from Handover Checklist, Deliverables Tracker, final forecasts, logs and Lessons Learned. References evidence instead of reproducing every record.

Selection rule: Choose this to formalize the end. Closure approval does not erase unresolved obligations or prove that benefits have already been realized.

What should be ready at each stage?

Review the evidence, then decide whether to continue, adjust or stop.

Stage	Decision to make	Useful evidence
Initiation	Is the project justified and authorized?	Business Case; Charter; key stakeholders and early risks.
Planning	Is the next work sufficiently defined and feasible?	Scope; WBS; linked dates; cost basis; risk responses; acceptance and handover needs.
Execution / Control	Are we delivering acceptable results within our authority?	Current forecasts; accepted outputs; resolved or escalated issues; controlled changes and actions.
Reporting / Governance	What needs oversight or a decision now?	Dated Status Report; options and impacts; Decision Log; focused agenda and minutes.
Closure	Can responsibility transfer and the project end?	Acceptance and handover evidence; residual owners; costs and obligations; lessons; Closure Report.

START EARLIER THAN THE PICTURE SUGGESTS

Create an Issue Log as soon as issues exist. Capture lessons during delivery. Agree handover criteria during planning. Review the business justification when significant changes affect expected value.

A STAGE REVIEW CAN BE SMALL

For a small project, a short review with a recorded decision may be enough. A major project may need formal evidence and independent review. The decision maker and required authority should be clear in both cases.

A PRACTICAL GATE QUESTION

“What evidence tells us that the next commitment is sensible, and who is authorized to make it?”

Choose between similar templates

Similar-looking documents often answer different questions.

Pair	Use the first for...	Use the second for...
Business Case / Charter	Why invest? Compare value, options and assumptions.	Who authorizes the project, with what purpose and authority?
Scope Statement / WBS	Boundaries and acceptance of the agreed result.	A hierarchy organizing the total work within those boundaries.
WBS / Schedule	What work belongs in scope.	Sequence, dependencies, resources and dates.
Risk Register / Issue Log	An uncertain event that may affect objectives.	A problem or unresolved matter that exists now.
Issue Log / Action Log	The problem, its impact and resolution.	A specific commitment to do something by a date.
Change Request / Change Log	One proposed change and its assessment.	The overview of requests, decisions and implementation.
Decision Log / Minutes	A lasting record of a significant choice and rationale.	The context and outcomes of a particular meeting.
Deliverables Tracker / Handover Checklist	Whether promised outputs are reviewed and accepted.	Whether a receiving team is ready to own and operate them.
Handover Checklist / Closure Report	The practical transfer of responsibility.	The final account and authorized project closure.

ONE ITEM CAN HAVE SEVERAL LINKED RECORDS

Risk R-01 becomes Issue I-03. Action A-07 investigates options. Change CR-03 requests a controlled alteration. Decision DEC-04 authorizes it. Each record has a different purpose; cross-references preserve the story.

Use enough structure for the work

A useful template system should be easy to maintain and hard to misread.

Context	Practical adaptation	Keep visible
Small, low-complexity project	Combine charter and scope in a short brief; use one workbook or project board for typed logs.	Authority, owners, dates, acceptance and decisions.
Predictive delivery	Baseline agreed scope, schedule and budget; assess changes against that reference.	Both the original baseline and current forecast.
Agile delivery	Use backlog and release views for evolving work. Link acceptance evidence and decisions in the delivery system.	Goals, funding boundaries, quality, authority and value.
Hybrid delivery	Use common milestones and handoff criteria across planned and adaptive workstreams.	Interfaces, integration dependencies and one overall forecast.
Large or assurance-heavy project	Use structured reviews, controlled versions, traceable evidence and clear approval roles.	The required level of oversight and reliable record history.

COMBINE CONTAINERS, PRESERVE MEANING

A single workbook can hold risk, issue, action and decision tabs. A single tool can provide separate views. Keep the item type, owner and workflow clear; combining everything into an untyped list makes control harder.

AVOID DUPLICATE SOURCES OF TRUTH

If an existing backlog or service tool already tracks work and acceptance, link it. Do not rebuild the same data in a separate tracker solely to match a template title.

AGILE DOES NOT REMOVE AUTHORITY BOUNDARIES

Teams can reorder or refine work within delegated scope and funding. Changes beyond agreed commitments still need the appropriate decision and a record of their impact.

One project, connected records

Fictional case: opening a community learning centre in 12 weeks.

Moment	Select these templates	What gets recorded
Before commitment	Business Case; Charter; Stakeholder Register	Compare options, authorize the objective and identify users, sponsor and service owner.
Planning	Scope; WBS; Schedule; Cost Estimate; Risk Register	Define room, computers, booking and training; estimate linked work; record supplier uncertainty as R-01.
Supplier delay confirmed	Issue Log; Action Log	I-03 records the problem and impact. A-07 asks Leo to compare recovery options by Thursday. Update R-01 with its realized status.
A recovery option needs approval	Change Request / Log; Decision Log; Agenda / Minutes	CR-03 sets out impacts. A steering meeting decides. DEC-04 records the authority, rationale and conditions.
Recovery and delivery	Schedule; Status Report; Deliverables Tracker	Update forecasts and approved baselines where authorized. Report the effect and collect acceptance evidence for D-02.
Opening and formal end	Handover Checklist; Lessons Learned Log; Closure Report	Transfer support and open actions; record the supplier lesson; approve closure and assign future benefits reviews.

THE LINK IS MORE USEFUL THAN DUPLICATION

Use identifiers such as R-01, I-03 and CR-03 in related entries. A reviewer can follow the evidence from uncertainty to problem, decision, implementation and learning.

Suggested starter packs

Select records by need; these are practical combinations, not universal rules.

PACK A: A SMALL INTERNAL PROJECT

Use a short project brief combining charter and scope, a simple work plan with dates and costs, one clearly typed log for risks/issues/actions/decisions, a brief status update and a combined handover/closure record. Include a short value justification and identifiable stakeholders.

PACK B: SEVERAL TEAMS OR SUPPLIERS

Use separate Business Case, Charter and Scope Statement; WBS, linked Schedule and Cost Estimate; Stakeholder and Risk Registers; the four execution/control records; the three governance records; and the three closure records as needed. Link shared data rather than maintaining duplicate copies.

PACK C: AN EVOLVING DIGITAL PRODUCT PROJECT

Keep a brief authorization and value record, stakeholder information, funding and release forecasts, and working risk/issue/decision records. Use backlog and acceptance views for work and deliverables. Add change control for changes outside delegated commitments, then plan operational handover and closure where applicable.

ADD A TEMPLATE WHEN YOU SEE A CONTROL GAP

Repeated scope disputes suggest a clearer Scope Statement. Forgotten promises suggest an Action Log. Repeated debate suggests a Decision Log. Uncertain readiness suggests a Handover Checklist. Choose the record that addresses the observed gap.

THE IMAGE IS A STARTING SET

Some projects also need requirements traceability, a quality or test plan, communications planning, procurement records, a responsibility matrix or a benefits plan. Add them when the work or governance requires them; the 18 templates are not an exhaustive project management system.

RETIRE UNNECESSARY DUPLICATION

At a review, ask who uses each record and what decision it supports. Simplify unused fields and consolidate redundant views while preserving required evidence and approval history.

Build your own template set

Complete this before kickoff, then review it when the project changes.

PROJECT & CURRENT STAGE

Name the project and the next important decision.

CONTROL NEED

What uncertainty, commitment, decision or handover needs a record?

TEMPLATE OR EXISTING SYSTEM

Which template answers that need? Could an existing view do the job?

MINIMUM INFORMATION

Which fields and evidence must it contain? What can be removed?

OWNER & AUTHORITY

Who maintains it? Who reviews or approves the relevant decision?

UPDATE & ESCALATION

How often will it be reviewed? What event needs an immediate update?

LOCATION, LINKS & SUCCESS TEST

Where is the current record? What other IDs link to it? How will it help?

Selection agreed by: _____ Review date: _____

Terms worth agreeing together

Use consistent definitions across the team.

Term	Meaning
Acceptance	Confirmation by an authorized recipient that agreed criteria are met, or that stated exceptions are accepted.
Baseline	An approved reference against which changes and performance are compared.
Benefit	A useful improvement that results from using the project's outputs.
Contingency	An allowance for identified uncertainty, with an explained basis and control.
Deliverable	A result, product or service the project produces.
Dependency	A relationship that affects when work can start or finish.
Forecast	The latest expected outcome based on current information.
Governance	The arrangements for authority, oversight, accountability and decisions.
Issue	A current problem or unresolved matter requiring attention.
Register / log	A structured record of items; the names often overlap in practice.
Risk	An uncertain event or condition that could affect an objective.
Scope	The agreed boundaries of work and results.
Sponsor	The person or group supporting the project and providing or securing appropriate authority and resources.
Stakeholder	A person or group that affects or is affected by the project.
Work package	A manageable component at the lowest level of a WBS, defined enough to estimate and control.

A guide you can build on

The explanations expand the supplied image into practical selection advice.

SOURCE IMAGE

“Project Template Selection Guide - Which Template Should You Use at Each Stage?”

User-supplied image, credited in the image to EzoSoft / ezosoftware.com. Its five groups and all 18 template types are retained. The expanded wording, examples and recommendations in this book are original teaching content.

OFFICIAL TEMPLATE REFERENCE

European Commission, Directorate-General for Digital Services. PM² Artefacts. Includes official project documents, logs, meeting records and checklists. Use the collection as further reading and a source of downloadable forms; its terminology and governance roles may differ from this guide. [1]

FURTHER READING

[2] Project Management Institute. “Developing and elaborating effective work breakdown structures.” Supports deeper study of scope decomposition.

[3] Love, M. L. (2002). “Risks, issues, and changes - help, I'm drowning in logs!” PMI conference paper.

[4] Project Management Institute. “Lessons Learned - do it Early, do it Often.” A discussion of learning throughout delivery.

[5] Project Management Institute. “Leveraging the New Practice Standard for Project Estimating.” Further guidance on estimation and its basis.

1. European Commission: PM² Artefacts
2. PMI: Work breakdown structures
3. PMI: Risks, issues and changes
4. PMI: Lessons learned
5. PMI: Project estimating

EDITION NOTE

Prepared with AI assistance for Bertie Kangoya, October 2026. Web references checked on 2 October 2026. Examples, review rhythms and ownership suggestions are illustrative and should be tailored to the project's actual authority and working arrangements.