

Toolkit

The Vendor-Free IT Community.



PROJECT MANAGEMENT

These NOREX Member-contributed documents include business case templates, project prioritization, project planning, project charters, and staffing, transcripts, and polls. | TK001

Agile / Scrum	2
Business Case / Initiation	2
Change Management	4
Discussions	5
Estimation / Scoring.....	7
Go-Live	8
PMO (Project Management Office).....	8
Polls.....	8
Project Change	9
Project Charter	9
Project Planning	11
Project Prioritization	12
Project Summary	13
Project Tracking	14
Staffing	14
Testing.....	15

The NOREX Document Library is continually updated for the benefit of our Members. Please consider contributing documents from your organization. Thank you!

This Toolkit contains documents that have been voluntarily contributed by NOREX Members with the full knowledge that other Members may use the documents in any manner they see fit. NOREX and its Members shall not be held liable for any statements or interpretations contained within the documents. This Toolkit and related documents may be used for NOREX promotional purposes. Unauthorized use or distribution to non-NOREX Members is strictly prohibited.

Agile / Scrum

TRANSFORMATION TO AGILE. This presentation was given at a NOREX event and describes a migration to an Agile environment. 25 Pages (20-1086)

AGILE OVERVIEW. Definition, introduction, values, principles, practices, and benefits of the Agile methodology are presented in this document. 30 Pages (20-1046)

AGILE A3 PROJECT CHARTER TEMPLATE. This document provides an outline for preparing your project charter for an Agile methodology. 2 Pages (20-625)

AGILE / DEVOPS JOURNEY. Given at a recent NOREX event, this presentation offers a look at a fellow Member's journey through the transition to an Agile / DevOps methodology. 16 Pages (20-555)

AGILE SPRINT CAPACITY PLANNER. This worksheet provides categorization of Scrum team activities, planned and unplanned interruptions, prioritization, and support. 10 Pages (20-472)

SCRUM PRIORITIZATION MODEL. This prioritization scoring model considers business impact, risk, cost, effort, and quality improvement. 2 Pages (20-375)

SDLC WITH FUNCTIONAL ROLES. This Systems Development Life Cycle (SDLC) describes the functional roles of Agile and Waterfall deliverables. 2 Pages (20-200)

PROJECT MANAGEMENT ACTIVITIES CHECKLIST. Agile and Waterfall deliverables are tracked along with each project phase of an activity or task. 2 Pages (20-199)

AGILE LAYER II PLANNING STRUCTURE. This spreadsheet outlines requirements gathering and design for Agile and SCRUM teams. 5 Pages (20-024)

MS PROJECT DEVELOPMENT. This project will develop a web application supported by IT that maintains the callout rotation and employee responses for a callout incident. 26 Pages (50-315)

DEVOPS AND COMPANY CULTURE. This member presentation describes how Lean, DevOps, Agile, and architecture driven IT, along with company culture, are all critical components of successful solution delivery. 29 Pages (50-233)

CHALLENGES OF AN AGILE PRACTICE. This presentation was given at a NOREX event and outlines how to tackle the challenges of an Agile practice. 16 Pages (50-232)

DEVOPS BENEFITS & CHALLENGES. At a recent NOREX event, a Member shared experiences regarding the benefits and challenges of modern application development with DevOps. 6 Pages (50-296)

Business Case / Initiation

STAKEHOLDER REGISTER. Stakeholder roles, responsibilities, and more are logged using this register. 1 Page (20-1016)

PROJECT PROPOSAL TEMPLATE. This template provides an outline for drafting new project proposals. 5 Pages (20-955)

PROJECT MANAGEMENT TOOL COMPARISON. This spreadsheet contains specifications about several PM tools, including Planview, MS Project, CA Project, Daptive, Smartsheet, Wrike, Asana, ClickUp, Monday.com, Bamboo, and SP Project Tracker. 24 Pages (20-932)

PROJECT AND SOLUTION DEVELOPMENT. Outlined here is a process for managing IT projects from request or concept to deployment. 3 Pages (20-823)

BUSINESS PARTNER PROGRAM DECK. An effective business partnership helps broker the coordination and communication between organizations. 15 Pages (20-810)

IT BUSINESS REQUIREMENTS. Business requirements and processes are covered in this supply product project. 13 Pages (20-793)

IT PROJECT SELECTOR. Consider strategic alignment, risk, and complexity when looking at proposed IT projects. This worksheet helps evaluate these variables. 3 Pages (20-724)

BUSINESS CASE WORKSHEET. Project feasibility, initiation, planning, implementation, and shutdown are given weighted scoring in this business case worksheet. 3 Pages (20-723)

TECHNOLOGY PROJECT INITIATION. Keep your technology project organized and properly outlined using the following initiation system. 2 Pages (20-670)

PM SERVICES SOW. Following is a Statement of Work for Project Management services, which can be used as a template for other purposes. 4 Pages (20-427)

BUSINESS CASE PROCESS TEMPLATE. This template helps to organize project plans for product justification, enabling your organization to prioritize its resources based on sound decisions. 10 Pages (20-425)

BUSINESS CASE TEMPLATE. General project overview, staffing, costs/budget, benefits, and scheduling are all components of this template. 6 Pages (20-424)

IT BUSINESS CASE. This template can be used to track your project assumptions, objectives, schedule, cost benefit analysis, and more. 5 Pages (20-423)

PROJECT PROPOSAL TEMPLATE. When building your project plans, follow the steps outlined in this project proposal template. 5 Pages (20-410)

PROJECT BUSINESS CASE. This form is to be completed when requesting a project. Include purpose, timeline, and costs. 2 Pages (20-367)

PROJECT MANAGEMENT SOW. The following Statement of Work template contains requirements for quality control, methodologies, and open source software. 5 Pages (20-265)

BUSINESS ANALYSIS CENTER OF EXCELLENCE. Following is a description of the components of a Business Analysis Center of Excellence, or BACOE, and its value. 19 Pages (20-257)

BUSINESS ANALYSIS IMPLEMENTATION PROJECT. The Business Analysis Implementation Project (BAIP) was chartered to set up a formal structure for developing and supporting business analysis as a resource to assist business units with improving the efficiency, effectiveness, and success rates of their processes and projects. 16 Pages (20-256)

IT PROJECT INITIATION PROCESS. This workflow was developed to provide the business unit with information to properly request, initiate, develop, and implement an IT solution that will meet their business needs. 6 Pages (20-177)

PROJECT INITIATION PLAN. This plan includes initiation form, Rough Order of Magnitude (ROM), justification tools, business case, financial review, and project summary. 15 Pages (50-197)

THREE YEAR STRATEGIC ROADMAP. This template outlines a three year plan for a project. 6 Pages (50-190)

Change Management

REQUEST FOR CHANGE. Change management definitions accompany this change request form and flowchart. 3 Pages (20-1085)

CHANGE MANAGEMENT POLICY. This policy describes the procedures employed to track and approve modifications to enterprise IT systems, technologies, supporting infrastructure, and solutions. 3 Pages (20-1064)

CHANGE MANAGEMENT PROCESS FLOW. These guidelines help ensure standardized procedures are used for efficient and prompt handling of changes to minimize the impact of change-related incidents upon IT services. 8 Pages (20-1042)

CHANGE MANAGEMENT GUIDELINE. These guidelines help ensure standardized procedures are used for efficient and prompt handling of changes to minimize the impact of change-related incidents upon IT services. 8 Pages (20-1041)

IT CHANGE REQUEST FORM. This form includes description, impact categories, approval or rejection, and post-implementation sections. 2 Pages (20-1038)

CHANGE MANAGEMENT AND CONTROL POLICY. This policy provides standardized methods and procedures to meet change management requirements supporting IT operations. 5 Pages (20-1027)

CHANGE MANAGEMENT CHARTER. This charter is a systematic method for identifying, documenting, evaluating, and communicating all functionality and performance changes. 7 Pages (20-791)

CHANGE REQUEST PROCEDURE. This process includes the information needed to classify the change type, the appropriate level of communication based on change, and how to document the change. 9 Pages (20-762)

CHANGE MANAGEMENT POLICY. By having a formal change process in place, the impacts of proposed changes are better understood and the negative impacts of changes are minimized. 3 Pages (20-761)

IT CHANGE MANAGEMENT POLICY. This policy provides standard procedures for managing change requests in an agile & efficient manner. 2 Pages (20-704)

CHANGE MANAGEMENT POLICY. This policy is designed to provide a process for requesting and managing changes to business applications and other business critical systems created or maintained by the IT department. 3 Pages (20-578)

CHANGE MANAGEMENT POLICY. This Change Management process will assess the impact and risks of change, and document, identify, define, and formalize processes involved. 11 Pages (20-346)

CHANGE MANAGEMENT GUIDE. A four-phased approach to Change Management is described in this manual of tips, resources, and samples. 27 Pages (20-331)

CHANGE MANAGEMENT PROCESS. The Change Management process is designed to facilitate awareness of all parties involved in a technological change. 10 Pages (20-219)

IT CHANGE MANAGEMENT POLICY. This policy shall cover all changes which have an impact to a business unit, business function, or IT service. 2 Pages (20-156)

CHANGE REQUEST TEMPLATE. This current and new system change request form has fillable fields and room to log descriptions and justifications. 3 Pages (20-135)

IT CHANGE MANAGEMENT STANDARD. This document present Change Management practices, under the umbrella of IT Service Management, to be adopted and practiced by IT employees and those employees whose changes fall under the oversight of IT Change Management. 14 Pages (50-247)

CHANGE MANAGEMENT QUICK REFERENCE. This quick reference guide is intended to assist users with managing changes using ServiceNow. 2 Pages (50-243)

RISK ASSESSMENT. The following risk assessment questions, submitted by three different member organizations, help assess the risk associated with technical changes. 3 Pages (50-221)

CHANGE ASSESSMENT QUESTIONNAIRE. This change management document contains base questions regarding outages, followed by examples of answers. 4 Pages (50-318)

CHANGE MANAGEMENT RISK ASSESSMENT. This simplified risk assessment is limited to a few questions and designed to be free from subjective responses. 1 Page (50-317)

Discussions

PROJECT MANAGEMENT / PMO TRANSCRIPT. NOREX Members discussed the value a PMO returns to the business, the value of a PMO in a functional environment, introducing a PMO to an organization that is historically managed in silos, measuring success of a PMO for Agile Projects, the pros and cons of Waterfall vs. Agile, assigning projects, work intake process for smaller projects, tools to keep track of the lifecycle, documentation requirements for SDLC, the number of teams for ScrumMasters, and practicing Kanban. 23 Pages (NV2391)

RPA / AI / ML TRANSCRIPT. NOREX Members discussed RPA / AI / ML and value realized, best use cases, machine learning, training, citizen developers, using AI to boost business, RPA vendors, tools, and programming and locking down bots. 21 Pages (NV2382)

CONSTRUCTION INDUSTRY: IT PROJECT MANAGEMENT. NOREX Members discussed how best to elevate the presence of IT project management in the Construction Industry, community of practice standardization, master service integrators, Construction Management software, credential harvesting, and security. 14 Pages (NV2375)

SECURITY FRAMEWORKS TRANSCRIPT. NOREX Members discussed the hierarchy of security frameworks; most commonly used frameworks; categorization of control, platform, and risk frameworks; and active threat hunting. 14 Pages (NV2374)

GLOBAL IT ISSUES TRANSCRIPT. NOREX Members discussed the biggest issues they and their organizations are facing with a global footprint in today's business climate. The expectations with employees able to return to the office, IT talent recruiting and hiring internationally, standardization of processes, cybersecurity, procuring equipment globally, keyboard sourcing, and in-country IT support were challenges shared by all Member participants. 17 Pages (NV2371)

MICROSOFT TEAMS BEST PRACTICES TRANSCRIPT. NOREX Members discussed the implementation of Microsoft Teams within an organization, Teams' members as part of the infrastructure or collaboration teams, the use of the exploratory license program, promoting adoption and usage of the platform, and VoIP integrations. 49 Pages (NV2369)

IT CHANGE MANAGEMENT TRANSCRIPT. NOREX members discuss IT Change Management processes including recommended tools, governance approaches and communication protocols during this April 2021 session. 25 Pages (NV2363)

RISK MANAGEMENT TRANSCRIPT. NOREX members share strategies for identifying, managing and reporting risks during this February 2021 session. 21 Pages (NV2358)

SECURITY INITIATIVES FOR 2021 TRANSCRIPT. NOREX members share 2021 IT security plans including budgets, initiatives and tools during this January 2021 session. 34 Pages (NV2354)

PLANNING FOR 2021 TRANSCRIPT. NOREX members share their expectations for IT budgets, staffing levels, security initiatives, user support trends and other 2021 issues during this December 2020 session. 19 Pages (NV2351)

AGILE / SCRUM / DEVOPS TRANSCRIPT. Members discuss experiences and transitions moving to Agile, Scrum, DevOps environment during this November, 2020 WebForum. 21 Pages (NV2346)

BACKUP / RECOVERY TRANSCRIPT. Assuring that lost data can be accessed is a key factor to assuring businesses run smoothly. This discussion on this important task includes strong conversations around Veeam as a tool and its role in backing up Exchange. 10 Pages (NV2344)

PROJECT MANAGEMENT / PMO TRANSCRIPT. From getting started with a PMO to key metrics, tools used, project management governance, Waterfall vs. Agile, and more. Over 50 members participate in this September 2020 discussion. Several polls are included. 21 Pages (NV2342)

MANAGING AND MONITORING REMOTE TEAMS TRANSCRIPT. NOREX Members share policies, procedures and tools for managing and monitoring remote workers during this August 2020 WebForum. 20 Pages (NV2339)

BI / DATA ANALYTICS TRANSCRIPT. NOREX Members discuss Business Intelligence and Analytics processes and tools during this August 2020 WebForum. 19 Pages (NV2337)

ASSET MANAGEMENT / PROCUREMENT FOLLOWING COVID-19 TRANSCRIPT. NOREX Members discuss ITAM strategies and tools in light of the COVID-19 Pandemic during this May 2020 WebForum. 20 Pages (NV2323)

CHANGE MANAGEMENT TRANSCRIPT. NOREX hosted this Change Management discussion in March, 2020 with 60+ Members discussing new change management practices and trends as many embrace agile, lean, digital adoption and more. 17 Pages (NV2311)

DATA WAREHOUSE FOR BI TRANSCRIPT. What are the benefits of a data warehouse implemented into a BI framework? Members share the benefits they have achieved, solutions used, and best practices when engaging the business units during this December 2019 discussion. 15 Pages (NV2302)

WINDOWS 7 TO 10 UPGRADE TRANSCRIPT. NOREX Members discuss experiences and recommendations for the move from Windows 7 to Windows 10 during this November 2019 WebForum. 14 Pages (NV2300)

PROJECT MANAGEMENT / PMO TRANSCRIPT. NOREX Members share their project management / PMO experiences and solutions during this November 2019 WebForum. 17 Pages (NV2295)

VULNERABILITY MANAGEMENT TRANSCRIPT. NOREX members share recommendations on processes and tools to manage IT vulnerabilities and risks during this September 2019 WebForum. 20 Pages (NV2288)

IT BUDGET PLANNING / BEST PRACTICES TRANSCRIPT. NOREX members discuss budget planning processes, best practices, categories and helpful tools during this July 2019 session. 14 Pages (NV2280)

DEMAND MANAGEMENT TRANSCRIPT. NOREX members discuss Demand Management best practices, tools and solutions during this July 2019 session. 10 Pages (NV2277)

[O365 NEW FEATURES / INITIATIVES TRANSCRIPT.](#) Members share experiences with the implementation of various Microsoft Office 365 services and features including PowerBI, SharePoint, Skype for Business and Teams during this June 2019 WebForum. 32 Pages (NV2275)

[EMPLOYEE ONBOARD/OFFBOARD IT ISSUES TRANSCRIPT.](#) Members discuss IT issues related to Onboarding and Offboarding Employees during this May 2019 session. 26 Pages (NV2273)

[PROJECT MANAGEMENT / PMO TRANSCRIPT.](#) Members discuss IT Project Management methodologies and tools during this April 2019 WebForum. 17 Pages (NV2269)

[AGILE / SCRUM / DEVOPS TRANSCRIPT.](#) NOREX members share strategies, tools used and experiences with working in an Agile/Scrum/DevOps environment during a February 2019 WebForum. 21 Pages (NV2259)

[IT GOVERNANCE TRANSCRIPT.](#) NOREX members share recommendations for the establishment and management of an effective IT Governance practice during this January 2019 session. 11 Pages (NV2256)

[SELECT: SERVICENOW TRANSCRIPT.](#) NOREX Select Members from Fortune / Forbes 1000 organizations discussed achieving primary value drivers for a ServiceNow implementation, organization structure, implementation timelines, SAM Pro module, managing services in SNOW, ServiceNow enabling other IT capabilities and systems such as CMDB, and CAB workbench to run a CAB meeting. 18 Pages (NS213)

[SELECT: PROJECT MANAGEMENT TRANSCRIPT.](#) NOREX *Select* members discuss Project Management methodologies, governance and tools during this January 2021 session. 13 Pages (NS205)

[GOVERNMENT: PROJECT MANAGEMENT TRANSCRIPT.](#) Government Members discuss IT Project Management methodologies and tools during this January 2019 WebForum. 17 Pages (GSP098)

[CIO: ROLE / JOB DESCRIPTION OF THE CIO TRANSCRIPT.](#) Senior IT leaders discuss the evolution of the Chief Information Officer role during this October 2020 session. 17 Pages (CV076)

[CIO: IT'S ROLE IN BUSINESS SUCCESS TRANSCRIPT.](#) Senior IT leaders share strategies for aligning IT with business objectives during this July 2020 WebForum. Topics include cloud computing, staffing, project prioritization and Business Intelligence tool recommendations. 20 Pages (CV075)

[CIO: IT TRANSFORMATION TRANSCRIPT.](#) This March 2019 session featured strategic-level discussion on starting the transformation process, gaining executive support, involving business units and developing roadmaps for cloud usage and mobile device management. 19 Pages (CV071)

Estimation / Scoring

[SOFTWARE DEVELOPMENT ESTIMATION MODEL.](#) Estimate cost and time involved with software development using this model. 1 Page (20-803)

[IT PROJECT SELECTOR.](#) Consider strategic alignment, risk, and complexity when looking at proposed IT projects. This worksheet helps evaluate these variables. 3 Pages (20-724)

[GOVERNANCE PROJECT SCORE SHEET.](#) A template for tracking and outlining the expected impact, performance results, compliance, and other aspects of a proposed project. 2 Pages (20-554)

[PROJECT SCORECARD TEMPLATE.](#) Created for a medical environment, this scorecard template is suitable for device comparison and use as a decision matrix for many projects. 2 Pages (20-264)

[SCORING TRIAGE MODEL.](#) This template is helpful for IT project budgeting based on value, legal requirements, probability, costs, and ability to deliver. 2 Pages (20-254)

PROJECT SCORING WORKSHEET. This is an example of how the IT Advisory Council could score projects, used to calculate a weighted project score. 4 Pages (20-003)

Go-Live

PRODUCTION READINESS CHECKLIST. This checklist prepares the team for tracking project infrastructure, deployment, management, and impact. 2 Pages (50-348)

ERP GO-LIVE. This example shows organization of Oracle support groups for ERP go-live. 1 Page (20-962)

RELEASE MANAGEMENT. The release management process is described, as well as the benefits. 15 Pages (20-808)

PROJECT MANAGEMENT ONBOARDING. This document lists project steps from charter to onboarding. 1 Page (20-807)

PROJECT GO-LIVE PLAN TEMPLATE. The following template is a tool to assist in planning a go-live. 5 Pages (20-237)

GO-LIVE ACTIVITIES CHECKLIST. System readiness, IT infrastructure, project risk, and governance are some of the activities to be checked before going live. 3 Pages (20-203)

CUTOVER PLAN. This cutover plan for a Go-Live project includes getting started, readiness, and production. 2 Pages (20-179)

GO-LIVE ASSESSMENT. The following chart reflects Go-Live readiness assessment. 2 Pages (20-178)

PMO (Project Management Office)

IT PROJECT AND PORTFOLIO MANAGEMENT GUIDE. This is an introduction and overview of the Project Portfolio Management Guide as a standard for all IT projects. 8 Pages (20-988)

IT PROJECT PORTFOLIO MANAGEMENT STRATEGIC PLAN. This presentation offers an outline of future plans for the PPM processes and scope. 10 Pages (20-802)

IT PMO CHARTER. The Project Management Office charter is to improve both internal and external IT project execution and portfolio management. 1 Page (20-801)

PMO TECHNICAL REQUIREMENTS. This presentation was given at a NOREX workshop and discusses the process of implementing changes to production. 15 Pages (50-280)

Polls

QUICK POLL RESULTS: TECHNOLOGY & BUDGET TRENDS 2019. Member organizations participated in our Technology & Budget Trends poll in December 2018. This poll includes deployment plans, technology plans, cloud solutions, desktops/laptops, IT staffing/salaries, new technologies or applications implemented in 2018 and projects planned for 2019. 12 Pages (NP2252)

REAL-WORLD IT TRENDS. The IT professionals that make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. Real-World IT Trends is a collection of the NOREX Member input captured in the first quarter of 2021 from Virtual Roundtable and WebForum polls. 55 Pages (DT2021-1)

YOUR DATA: 2020 REAL-WORLD IT TRENDS. The IT professionals that make up NOREX realize the benefits of no-vendor bias when analyzing IT polls and trends. Real-World IT Trends is a collection of the NOREX Member input captured in the first half of 2020 from Virtual Roundtables and WebForum polls. 61 Pages (DT2020-1)

YOUR DATA: 2019 REAL WORLD IT TRENDS. The IT professionals that make up NOREX realize the benefits of no vendor bias when analyzing IT polls and trends. Your Data is a collection of the real world member input captured in the second half of 2019 WebForum polls. 36 Pages (DT2019-2)

YOUR DATA: 2019 REAL WORLD IT TRENDS. The IT professionals that make up NOREX realize the benefits of no vendor bias when analyzing IT polls and trends. Your Data is a collection of the real world member input captured in the first seven months of 2019 WebForum polls. 25 Pages (DT2019-1)

Project Change

PROJECT CHANGE REQUEST FORM. Below is a project change request form template. 1 Page (20-790)

SERVICE PLAN TEMPLATE. A Service Plan is designed to transition the sustainment responsibility from the project team to those involved in ongoing operations. 11 Pages (20-236)

OPERATIONAL READINESS INTAKE. This questionnaire provides an opportunity for each department to submit change requests in a timely and organized manner, so that they can be properly managed. 9 Pages (50-276)

Project Charter

PROJECT MANDATE TEMPLATE. This document provides an outline for creating an organized project mandate including objectives, scope, and requirements. 6 Pages (20-965)

IT GOVERNANCE GROUP. This presentation offers information on creating a governance framework promoting transparency, clarity, and consistency. 19 Pages (20-811)

ONE-PAGE CHARTER TEMPLATE. This is a sample single-page project charter template that can be adjusted to suit your needs. 1 Page (20-800)

TECHNICAL REVIEW BOARD CHECKLIST. A sample checklist for a project management technical review board. 1 Page (20-799)

PROJECT MANAGEMENT DOCUMENTS. Topics such as quality, risk, cost, HR, staffing, communications, and other components should be documented for each project. 2 Pages (20-796)

PROJECT GUIDELINES. All major IT projects that require configuration or development on company systems need to schedule and coordinate the following types of tasks and milestones. 1 Page (20-795)

RACI FOR PMF DELIVERABLES. Project Management Platform (PMF) deliverables are listed according to the RAFI (Responsible, Accountable, Consult, Inform) scale. 4 Pages (20-794)

MEETING NOTES TEMPLATE. Note-taking for a meeting can include detailing action items, discussion items, and future plans. 4 Pages (20-789)

PROJECT REQUIREMENTS TEMPLATE. Project scope, objectives, roles, cost estimates, and other variables must be part of your project requirements document, a template of which is found here. 5 Pages (20-788)

PROJECT CHARTER TEMPLATE. Provided here is a basic template for creating a project charter. 2 Pages (20-787)

PROJECT CHARTER LOG. Use this template to record an overview of the program and highlight any dependencies, interactions, or prioritization among the program's projects. 1 Page (20-786)

EXAMPLE PROJECT REQUIREMENTS. This example shows the planning stages of a project, where roles and responsibilities are determined. 6 Pages (20-785)

COMPLEXITY MATRIX & RISK PLAN TEMPLATE. Track the complexity and risk of the proposed plan using these PMO templates. 2 Pages (20-784)

IT INTEGRATION PROJECT CHARTER. The following is a table-style project charter template for IT integration. 2 Pages (20-713)

ONE PAGE PROJECT CHARTER. The basic information for a project charter can be outlined in this one page template. 1 Page (20-712)

PROJECT CHARTER TEMPLATE. This is an outline showing one variation of a project charter plan. 1 Page (20-711)

SOFTWARE ENHANCEMENT REQUEST FORM. This workbook provides a procedure for business assessment and requesting software enhancement & workflow builds. 6 Pages (20-676)

TACTICAL MANAGEMENT ROADMAP. Following is a process matrix and tactical roadmap of several IT processes and functions. 4 Pages (20-675)

TECHNOLOGY REVIEW PROCESS. This review process has been created to evaluation the impacts of applying technology to company services. 7 Pages (20-672)

TECHNOLOGY REVIEW WORKFLOW. These charts display an example of a technology review process workflow. 2 Pages (20-671)

PROJECT CHARTER TEMPLATE. A key role resource plan, budget, and rough schedule highlight this charter template. 3 Pages (20-606)

EXECUTIVE STEERING COMMITTEE. IT governance rules and IT Executive Steering Committee guiding principles are included in this charter. 10 Pages (20-543)

PROJECT DEFINE GATE TEMPLATE. These provide a snapshot of the objectives, overview, budget, benefit, risks, and scope of a project. 2 Pages (20-253)

PROJECT MANAGEMENT CHARTER. The IT Vendor Management Organization (IT VMO) works with the lines of business and IT to select and manage external product & service providers for the delivery of defined IT services. 8 Pages (20-116)

SYSTEMS GOVERNANCE CHARTER. The Systems Governance Committee serves two roles - IT Governance and Project Portfolio Oversight. 4 Pages (20-083)

IT STEERING COMMITTEE. The IT Steering Committee is a governing body for IT policies, procedures, and project portfolio in the organization. 2 Pages (20-082)

OFFICE PRODUCTIVITY REQUIREMENTS. This spreadsheet provides a template for productivity evaluations, functionality & spam reporting, as well as calendar, directory, migration, meetings, and other topics. 8 Pages (50-283)

RAID TEMPLATE. A Risks, Actions, Issues, and Definitions (RAID) log is a simple and effective project management tool for assessment and planning. 2 Pages (50-281)

PROJECT PLANNING EXAMPLE. This worksheet provides a layout of the planning phase of a project. 1 Page (50-224)

PROJECT MANAGEMENT LITE. Reasoning behind moving from PM to PM Lite, differences between the two, and supporting services, rollout and results are presented here. 15 Pages (50-200)

Project Planning

PM FRAMEWORK RACI DELIVERABLES. The following project management framework deliverables are presented in a matrix by RACI phase. 2 Pages (20-1098)

RISK REGISTER TEMPLATE. This worksheet is a log of constraints, risks, and issues within a project. 2 Pages (20-1015)

PROJECT MANAGEMENT PLAN. This template provides a basic outline of all project lifecycle phases. 3 Pages (20-1013)

PROJECT SIZING NORMS. This chart uses the T-shirt sizing method for determining the scope and duration of projects. 1 Page (20-856)

PROJECT ESTIMATION THROUGH T-SHIRT SIZING. This model uses T-shirt sizing as an effective project scoping, forecasting, or estimation technique. 1 Page (20-855)

PROJECT MANAGEMENT DOCUMENTS. Topics such as quality, risk, cost, HR, staffing, communications, and other components should be documented for each project. 2 Pages (20-796)

PROJECT GUIDELINES. All major IT projects that require configuration or development on company systems need to schedule and coordinate the following types of tasks and milestones. 1 Page (20-795)

RACI FOR PMF DELIVERABLES. Project Management Platform (PMF) deliverables are listed according to the RAFI (Responsible, Accountable, Consult, Inform) scale. 4 Pages (20-794)

EXAMPLE PROJECT REQUIREMENTS. This example shows the planning stages of a project, where roles and responsibilities are determined. 6 Pages (20-785)

COMPLEXITY MATRIX & RISK PLAN TEMPLATE. Track the complexity and risk of the proposed plan using these PMO templates. 2 Pages (20-784)

SOFTWARE ENHANCEMENT REQUEST FORM. This workbook provides a procedure for business assessment and requesting software enhancement & workflow builds. 6 Pages (20-676)

TACTICAL MANAGEMENT ROADMAP. Following is a process matrix and tactical roadmap of several IT processes and functions. 4 Pages (20-675)

TECHNOLOGY REVIEW PROCESS. This review process has been created to evaluation the impacts of applying technology to company services. 7 Pages (20-672)

TECHNOLOGY REVIEW WORKFLOW. These charts display an example of a technology review process workflow. 2 Pages (20-671)

TECHNOLOGY PROJECT INITIATION. Keep your technology project organized and properly outlined using the following initiation system. 2 Pages (20-670)

PROJECT REQUEST TEMPLATE. This example of a technology department's project request form is how the department can gather basic information. 1 Page (20-666)

SOW TEMPLATE. A member shares a template from which you can create your own Statement of Work. 3 Pages (20-628)

GOVERNANCE INFORMATIONAL BRIEF. This template provides a format for creating your own executive leadership team governance brief. 2 Pages (20-552)

SAMPLE PROCESS MAP. The following is a sample process map for a Project Management Team's use. 1 Page (20-184)

IT PROJECT SCOPE TEMPLATE. This is a basic template for organizing all of the aspects of an upcoming project. 2 Pages (20-155)

PROJECT PLAN TEMPLATE. A project plan is useful especially for projects that are expected to involve numerous people or resources, or expected to take larger amounts of time. 5 Pages (20-139)

PM PLAN TEMPLATES. The following are examples of project management planning grids, group policy audits, and distribution projects. 4 Pages (20-138)

SOW TEMPLATE. The following is a template & example of the main components of a basic Scope of Work. 4 Pages (20-102)

Project Prioritization

SUPPLY CHAIN METHODOLOGY PROPOSAL. This presentation offers a proposal summary, prioritization model, and evaluation formula for supply chain methodology. 19 Pages (20-805)

IT PERFORMANCE DASHBOARD. This project dashboard charts IT efficiency and KPIs. 1 Page (20-804)

PROJECT PRIORITY DETERMINATION. This matrix helps to decide how to prioritize your IT projects. 1 Page (20-717)

IT WORK PRIORITIZATION PROCESSES. Based on the type, size, and scope of work, this process can help identify which project and support teams must be involved. 1 Page (20-553)

PROJECT REQUIREMENT WORKSHEET. Requirements for a project can be logged according to functionality and success factors. 2 Pages (20-498)

PROJECT PRIORITIES MATRIX. Using this matrix will enable your organization to score and rate potential projects for a particular fiscal year. 1 Page (20-430)

PROJECT PRIORITIZATION. Document the prioritization of IT projects according to urgency, cost savings, productivity, or other criteria with this table. 3 Pages (20-429)

PM MASTER SCHEDULE. Project managers can use this to track project personnel, analyze capital projections & expenditures, and prioritize projects accordingly. For personnel resources, the spreadsheet lists each employee by project, tracks the hours needed by each person for each project, and adds up the total hours needed per person per project per week to help managers allocate and assign staff. 28 Pages (20-222)

GANTT CHART TEMPLATE. This document has a tool that will auto populate a GANTT chart when you enter a task. It is a simple tool that is designed for Executive audiences or for a Project Briefing/Review. 3 Pages (20-136)

PRIORITY-DRIVEN DELIVERY. Slides regarding impact, urgency, and accountability help describe how priority drives an organization to focus and finish. 20 Pages (50-199)

CAPACITY MANAGEMENT: RULE OF 7. The Rule of 7 says that work items and project management activities are assigned a value by work type. If assignments total more than 7 points, action must be taken to reduce the workload capacity. 1 Page (50-198)

Project Summary

PROJECT LESSONS LEARNED. For each project, record lessons learned during each phase of execution. 2 Pages (20-1017)

PROJECT CLOSEOUT FORM. This template lists scope, funding, schedule, and other project closure specifics. 3 Pages (20-1014)

PROJECT REQUEST TEMPLATE. This form outlines the business case for adding a capital project. 2 Pages (20-983)

PROJECT SUMMARY. This template is for recording lessons learned, project results, and status report. 6 Pages (20-966)

WINDOWS 7 TO 10 PROJECT EVALUATION. A Member shares an example of a Windows 7 to 10 upgrade project questionnaire. 1 Page (20-841)

PROJECT CLOSURE CHECKLIST. When approaching the completion of a project, a closure checklist can help ensure all requirements have been met. 7 Pages (20-809)

LESSONS LEARNED LOG. Keep a record of lessons learned during a project by following the format displayed in the template below. 1 Page (20-792)

ROI TEMPLATE. This spreadsheet contains an example of an ROI method, logging call deflection, incremental cash flow, and risk aversion. 6 Pages (20-458)

RANKING LARGE IT PROJECTS. This table creates ways of defining the success or failure of larger IT projects, including benefits & risk factors. 4 Pages (20-428)

RISK REGISTRY DASHBOARD. This dashboard template logs impact area, source risk factors, description, probability, assessment, and response. 5 Pages (20-384)

RISK REGISTER TEMPLATE. This risk register contains typical risks that have been identified on previous projects, potential triggers, and possible responses. A contingency plan is also suggested. 5 Pages (20-383)

POST-IMPLEMENTATION SUPPORT PLAN. The following template assists in defining the support of the deliverable post-implementation. This document clearly sets the expectations for supporting the deliverable. 4 Pages (20-238)

PROJECT CLOSURE SURVEY. This is a sample of a post-project survey and the types of questions that could be asked and answered. 1 Page (20-022)

POST IMPLEMENTATION REVIEW. With a post implementation review, a project's execution can be assessed, achieved objectives can be identified, and lessons learned can be reviewed. 8 Pages (50-278)

Project Tracking

PROJECT BOOK TEMPLATE. Chart status on project hours, risks, communication plan, issues, and lessons learned with this template. 13 Pages (20-580)

PROJECT DEFECT TRACKING. Tracking project defects reveals what the issues are, the impact levels, root cause, and solution. 2 Pages (20-496)

TIME TRACKING SOP. This document provides guidelines for the tracking of IT Staff hours for both projects and non-project work. 2 Pages (20-255)

PROJECT MANAGEMENT WORKBOOK. This workbook allows project managers, team members, and stakeholders to track & monitor project activities. 22 Pages (20-221)

PROJECT MANAGEMENT SCORECARD. Following is a scorecard for mature resource management, including information on framework, ratings, samples, and scoring criteria. 11 Pages (50-194)

Staffing

CUSTOMER MASTER DATA PROJECT MANAGER. 1 Page (20-798)

PROJECT MANAGER EXPECTATIONS. A Member shares three major characteristics of a good Project Manager. 2 Pages (20-797)

PROJECT ROLES & RESPONSIBILITIES. This template helps describe the assignment of roles and responsibilities for your upcoming project. 2 Pages (20-783)

PROJECT MANAGEMENT COMPETENCY FRAMEWORK. This chart provides a list of competency levels for those involved with project management. 2 Pages (20-688)

PRINCIPAL INFORMATION SYSTEMS ANALYST. 3 Pages (20-612)

IT PROJECT COORDINATOR. 2 Pages (20-583)

PROJECT COORDINATOR / SYSTEMS ANALYST. 3 Pages (20-582)

PROJECT COORDINATOR / ANALYST. 1 Page (20-581)

PROGRAM MANAGER. 1 Page (20-520)

PORTFOLIO MANAGER. 2 Pages (20-519)

RESOURCE MANAGER. 1 Page (20-518)

PROJECT MANAGER. 1 Page (20-517)

PROJECT ANALYST. 1 Page (20-516)

PROJECT COORDINATOR. 1 Page (20-515)

PROJECT ORGANIZATION CHART. This chart shows typical organization for business systems or information systems projects between project core team, project team, and stakeholders. 1 Page (20-344)

RACI FOR PROJECT TEAMS. Following is a responsibility assignment matrix for various project teams. 5 Pages (20-328)

PROJECT MANAGEMENT FLOWCHART. This flowchart template is an example of the disbursement of responsibility within the IT department. 1 Page (20-327)

SENIOR IT PROGRAM / PROJECT MANAGER INTERVIEW. The following questions are designed to help determine the qualifications of an individual applying for a Senior IT Program or Project Manager position. 6 Pages (50-275)

PROGRAM / PROJECT MANAGER. 2 Pages (50-274)

Testing

OPERATIONAL TRANSITION READINESS. This document captures design outputs of IT change, be it an application, infrastructure, or any other service, in preparation for providing an operational state that best supports business requirements. 19 Pages (20-806)

SOW: TESTING. This template logs quality assurance COTS implementation, deliverables, and other aspects of testing. 1 Page (20-506)

REQUIREMENTS TRACEABILITY MATRIX. Use this template to trace requirements to a test case, especially if testing is not housed in a testing tool. 2 Pages (20-505)

TESTING SIGNOFF TEMPLATE. The following provides a format for recording results of project testing upon completion. 1 Page (20-501)

TEST STRATEGY & USE CASE TEMPLATES. Project planning tools include this test strategy worksheet and a use case. 2 Pages (20-500)

TEST PLAN TEMPLATE. This template is for any size project. Create for large, complex, high-risk, and/or high-visibility projects at the beginning of the project to ensure project team alignment & stakeholder approval. 6 Pages (20-499)

TEST TRACKING TEMPLATE. This chart tracks pass/fail and defects when testing. 1 Page (20-497)

PRODUCTION ACCEPTANCE REVIEW. The following checklist of test phase exit criteria questions is designed to help evaluate project management. 7 Pages (20-180)

QUALITY CONTROL TEST PLAN. This is a test plan template for a Quality Control (QC) environment. 19 Pages (20-075)

SAP TEST DOCUMENTATION. This workbook includes sample support pack schedule, descriptions, test signoff, and transaction list. 22 Pages (20-067)

SAP SUPPORT DOCUMENTATION. This form includes support pack schedule, testing, and password reset. 1 Page (20-066)