Template: Project Management Documents

Share project updates and wins with your team by using this project communication template. Learn more about these templates [here](.).

Use this template to document the necessary information and reference sources for projects. Use the FAQ at the end to easily supply readers with plenty of related information. You can write project notes directly in this template or link to other documents.

Project Overview

[Provide a short summary of the project. Link to a project brief or kick off template.]

Project Timeline

[List an overview of the project's timeline then link to a more detailed timeline.]

Resources

[Create a list of relevant and helpful resources for stakeholders as they're working on the project.]

FAQ

Question 1: [Add first question here.]
- Answer
- Related resources

Question 2: [Add second question here.]
- Answer

- Related resources

Question 3: [Add third question here.]
- Answer
- Related resources

[Project Name]: Project Brief

Project Summary

[Provide an overview of the project, keep it short as you'll dive further into project details below]

Project Goals & Expected Outcomes

[Add the problem we're solving (or speculative opportunity we are addressing), why we're solving it, any links to customer conversations or research. Clearly explain all facets of the problem.]

- **[Project goal 1]**
  - [Define the goal and expected result]
- **[Project goal 2]**
  - [Define the goal and expected result]
- **[Project goal 3]**
  - [Define the goal and expected result]

OKRs and Deliverables

[Indicate which Pod OKRs this project is meant to support. If not aligned to OKRs, elaborate why it should take priority.]

- **[OKRs]**
  - [List which OKRs this project is supporting.]
- **[Deliverables]**
  - [List the deliverables for this project.]

Success Indicators

[Add how we will determine whether the problem has been solved. Qualitative and quantitative measures.]

- **[Success Indicator 1]**
  - [Outline a potential indicator and how it will be measured.]
- **[Success Indicator 2]**
  - [Outline a potential indicator and how it will be measured.]

Project Timeline

[Indicate the estimated project duration, key milestones and important timeline information.]

Project Stakeholders and Teams

[Include the stakeholders and teams involved in the project.]

Project Audience

[Explain the audience that the project is intended for.]

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Project Communication Plan Template

[MM/DD/YYYY] Updates

[Utilize this template for regular updates regarding important project information, updates, and accomplishments. Set it to daily, weekly, or customized intervals to ensure it's kept up to date and stakeholders remain informed.]

General Status Updates

[Include a list of key updates here. This can include metrics, accomplishments, or anything else you feel should be shared as a status update.]

Shoutouts

[Shine the spotlight on team members who have been doing exceptionally well.]

What's Next?

[What are the next steps in the project's timeline? Document the upcoming phase of the project here along with any expectations or milestones.]

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Project Budget: [Project Name]

Mission: *[Type in an overview of your company's mission and where the project fits in]*

Completion date: *[Date of when you anticipate your project to be completed]*

Summary

[Identify business opportunities and answer the "why?" of the project.]

Project Budget

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(When you open, click *File > Make a copy*)

Objective and Key Result (OKR) Template

[Every project needs performance metrics that align with your organization's goals. If your team doesn't yet have a company-wide way to share organizational goals (aka objectives and key results or OKRs), you can use this template to jumpstart your company documentation.]

Introduction

[Provide your team with an introduction to your key result and how it ties to one of your objectives for the month, quarter, or year. Be sure to give as much context as possible—videos and images also help!]

Description

[Describe what this key result means. When using terms that team members may not be familiar with, link to a glossary-style card or some other resource to make it easy for everyone to understand.]

Current Status

- [How is this key result tracking quarter-to-date?]
- [Include links to analytics reports or project status reports, or however you would like to share the progress.]

Additional Resources

- [Any additional info that would be helpful to understand this key result—research, explainer concepts, etc.]

Project Status Report

[Use this template by Shona Fenner, Sr. Customer Success Operations Manager at PetDesk to document the status of an upcoming project or launch. Include background information on the project and its benefits. Add FAQs to the project as it progresses and empower teams with documentation from day one.]

Project Description

The objective of this project includes:

- [Objective #1]
- [Objective #2]
- [Objective #3]

Project Benefits

The key benefits of this project for our customers include:

- [Benefit #1]
- [Benefit #2]
- [Benefit #3]

Project Timeline

The timeline of this project is:

- [Milestone 1]
- [Milestone 2]
- [Milestone 3]

Status Updates

[Document how you are progressing towards each milestone on a recurring basis.]

- [Week 1]
- [Week 2]
- [Week 3]

FAQs

[Add to this section as questions come up during the project. This will support your documentation efforts and empower your team.]

Question 1

[Question description]

- [Answer]
- [Resource]
- [Resource]

Question 2

[Question description]

- [Answer]
- [Resource]
- [Resource]

Question 3

[Question description]

- [Answer]
- [Resource]
- [Resource]

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12 Expert-Designed Change Management Templates

These 12+ free change management templates are crafted just to make your life easier. Pair this with our [Expert Guide to Write a Change Management Plan](#) and a cup of coffee and you'll be ready to skyrocket your productivity and your team's impact.

Our Change Management Template Kit includes:

- [Change Management Roadmap](#) (Excel, Google Slides)
- [Change Management Communications Plan](#) (Excel, Google Slides)
- [Change Management Plan Doc](#) (Word)
- [Change Management Plan Doc](#) (Google Docs)

- Change Management Plan Presentation Template (PPT, Dark)
- Change Management Plan Presentation Template (PPT, Blue)
- Change Management Plan Presentation Template (PPT, Light)
- Change Management Plan Presentation Template (Google Slides, Dark)
- Change Management Plan Presentation Template (Google Slides, Blue)
- Change Management Plan Presentation Template (Google Slides, Light)
- Change Request Form (Word Doc, Google Doc)
- Change Management Resource

Project Plan Templates

Use these templates to round out your project planning:

- Project Timeline Template
- Project Communication Template
- Project Status Template
- Project Plan Example: PetDesk's Feature Rollout Template

[PROJECT NAME]

Mission: *[Optional, type in an overview of your company's mission and where the project fits in]*

Completion date: *[Date of when you anticipate your project to be completed]*

SUMMARY

[Identify business opportunities and answer the "why?" of the project.]

GOALS AND KPIS

[How do you plan to measure the project's success?]

- **[Objective 1]**
  - [KPI metric]
- **[Objective 2]**
  - [KPI metric]
- **[Objective 3]**

- [KPI metric]

TIMELINE

[Include a step-by-step timeline that includes important deadlines throughout the project.]

- **[Project milestone/benchmark 1]**
  - [Stakeholders & deliverables]
- **[Project milestone/benchmark 2]**
  - [Stakeholders & deliverables]
- **[Project milestone/benchmark 3]**
  - [Stakeholders & deliverables]

SUCCESS METRICS

[State the project metrics and how they will be measured.]

RESOURCES

[Send stakeholders to other relevant sources for information related to the project.]

PROJECT LEADS

[Who are the stakeholders, project leadership, etc.?]

Project Plan Presentations

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Project Timeline Presentations

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