



HR Resource: Project Management

Supplemental Materials

- **Comprehensive Guide**
- **Forms**

HR Toolkits



AAIM

Project Management Toolkit

This toolkit offers practical guidance for building a consistent project management approach, adaptable across various types of initiatives. Strategic project management is more than task coordination. It's about aligning resources, goals, and leadership around impactful business initiatives. Equip your managers with this structured approach to ensure consistency, performance, and results. Project management will help you:

- Meet deadlines more quickly.
- Improve project outcomes.
- Simplify delegation.
- Meet all project requirements.

Core Elements of Project Management

- **Scope:** Defines project boundaries and purpose. Align stakeholders by clearly articulating the problem, objectives, and strategic value.
- **Objectives:** Establish measurable goals and key deliverables with timelines. Validate expectations with stakeholders to ensure alignment.
- **Resources:** Account for required tools, budget, staff capacity, and materials. Understand resource constraints early to manage outcomes and avoid overruns.
- **Risks:** Identify internal and external variables that may delay or derail the project. Prepare mitigation strategies aligned to risk categories: technical, organizational, managerial, or external.
- **Schedule:** Outline milestones and delivery deadlines in a trackable format. Use shared platforms for visibility and accountability.
- **Evaluation:** Define what success looks like using metrics and post-project reviews. Progress reports should track budget, timeline, and deliverable completion.

What to Expect from Effective Project Managers

- **Strategic Value:** Every project must serve a clear business purpose. Project leaders should understand what's at stake—particularly in mid-sized organizations where success can shift market share or profitability.
- **Clear Communication:** Project managers must facilitate cross-functional alignment—interacting with teams, vendors, legal, tech, and leadership to ensure timely and informed decisions.
- **Team & Client Impact:** Leaders must manage expectations and scope to avoid “mission creep.” Discipline in execution preserves timelines, budgets, and stakeholder trust.

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A 14-Step Roadmap for Project Success

1. **Define Purpose:** Understand the “why.” Projects should solve real business challenges—whether increasing retention, launching new services, or improving operations.
2. **Craft a Vision Statement:** Clarify your project’s intent in a succinct, strategic message that aligns stakeholders from the start. Here’s an example vision statement:

This project is to target small business owners that need reliable IT support. Our managed service product is a different approach to IT help that gives small businesses predictable pricing. Unlike other businesses that limit support requests, our product offers 24/7/365 support to clients.
3. **Choose the Right Framework:** Align your approach—Agile, Scrum, Waterfall, Kanban, or V-Shaped—based on complexity, team structure, and need for iteration.
 - a) **Waterfall** - This is also known as traditional project management. With Waterfall, you create a series of steps to finish a project and complete them in order. You only test the product at the very end. Waterfall works well for simpler projects with little ambiguity, but it isn’t ideal if you need to frequently iterate a product or incorporate feedback.
 - b) **Kanban** is the most visual way to manage projects. You can create either a physical or digital Kanban board that breaks tasks up into different stages like “Planning,” “In Progress,” and “Done.” Kanban is great if you want to visualize where multiple projects are at once. However, it isn’t ideal if your project has a lot of moving parts, which can make the Kanban board look cluttered and unhelpful.
 - c) **Scrum** - The Scrum approach to project management requires teams to complete work in fast-paced sprints. In each sprint, the team focuses on one issue or task. You have daily meetings as a team to share progress on these tasks and address challenges together. Scrum is great for adding structure to tasks with predictable turnaround times. However, the fast-paced nature makes Scrum less practical for understaffed teams.
 - d) **Agile** projects work in sprints like Scrum, although the sprints are longer. It isn’t unusual for an Agile sprint to last two weeks to a few months. Agile was originally designed for iterative software development that incorporated testing and user feedback. Agile moves very quickly and allows teams to respond to feedback before finishing the product. It’s ideal for iterative projects, like software, but it isn’t ideal if you don’t have enough staff.
 - e) **V-shaped** project management is another approach taken from the world of software development. The V-shaped method revamps the Waterfall model to add time for testing before the last stage of the process. At each stage, your team tests and validates the product before moving on. This is ideal for small projects with a defined scope, but it requires an in-depth plan to work well.
4. **Assemble Your Team:** Identify essential roles early. Smaller, agile teams are typically more effective. Define responsibilities and communicate frequently.

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5. **Outline Scope & Objectives:** Set realistic goals and boundaries. Delegate effectively, focusing team effort on high-impact deliverables.



6. **Assess Risks:** Build a plan that anticipates possible setbacks. Address technical, personnel, and external threats before they impact outcomes.
7. **Engage Stakeholders:** Keep decision-makers informed with a communication plan that ensures timely feedback and buy-in.
8. **Create a Roadmap:** Visually organize project phases, dependencies, and milestones. This helps align internal teams and manage expectations externally.
9. **Audit Resources:** Confirm staffing, budgets, and tools are sufficient. If gaps exist, adjust the scope, budget, or deadline accordingly.
10. **Build a Realistic Schedule:** Break large phases into smaller tasks. Assign work based on team strengths and capacity.
11. **Utilize Project Management Software:** Tools like Asana, Trello, or Wrike streamline collaboration, tracking, and file sharing.
12. **Host a Kickoff Meeting:** Align all participants with clear agendas, defined roles, shared goals, and immediate next steps.
13. **Monitor & Adapt:** Be flexible. Use data to reassess timelines, reallocate resources, or adjust scope as needed.
14. **Celebrate Milestones:** Acknowledge progress to maintain morale, recognize effort, and reinforce momentum.

Software Solutions

- Wrike – allows you to organize work, assign tasks, and collaborate across departments
- Trello – This is a Kanban board-style PM solution that makes it easy to drag tasks to different stages.
- Asana – This is primarily a text-based PM software, although it also has Kanban and Gantt layouts available.
- Zoho – This project management software combines PM with sales, marketing, finance, HR, and other business-critical tasks.
- Workfront – helps you connect, collaborate, and simplify workflows to launch campaigns and deliver personalized experiences at scale.

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Project Management Forms Toolkit

1. Project Initiation (Define the project's purpose and feasibility.)

- a) Define project goals and alignment with business strategy.
- b) Conduct a stakeholder analysis.
- c) Develop a project charter.

Forms:

- Project Charter Template
- Stakeholder Analysis Matrix
- Business Case Summary

Project Charter Template

PROJECT TITLE
Project Manager (name and contact information):
Business Need (Describe the purpose):
Scope (Define what is in/out of scope):
Timeline (High-level timeline):
Stakeholders (Key individuals/groups involved in the project):
Budget (Estimated costs – itemized):

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Stakeholder Analysis Matrix

Stakeholder Name (including contact information)
Role (Position/Title):
Interest (What do they care about?):
Influence (Level of influence -- High/Medium/Low):
Engagement Strategy (How to manage the relationship?):

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Business Case Summary

PROJECT NAME
Problem/Opportunity (State the issue or opportunity):
Benefits (Quantitative/Qualitative Benefits):
Costs (High-level cost estimate):
Risks (High-level risks):
Conclusion (Recommendation and ROI):

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2. Project Planning (Outline project scope, resources, timelines, and risk management.)

- a) Create a Work Breakdown Structure (WBS).
- b) Build a project schedule (Gantt chart).
- c) Identify risks and mitigation strategies.
- d) Assign roles and responsibilities (RACI matrix).
- e) Define budget and communication plan.

Forms:

- WBS Template
- Project Plan Checklist
- Risk Management Log
- RACI Chart Template
- Communication Plan Outline

Work Breakdown Structure Template

WBS LEVEL 1, 1.1, 1.2, ETC.
Task Name (describe task):
Responsible Party (Assigned person/team):
Estimated Time (Duration or effort estimate):
Dependencies (Tasks that must be completed first):

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Project Plan Checklist

PLANNING AREA (Scope, Schedule, Budget, etc.)
Task (Describe planning task.):
Completed (Mark Y/N):
Notes (Additional information):

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Risk Management Log

RISK ID (UNIQUE IDENTIFIER):
Description (detail of risk):
Likelihood (Low/Med/High):
Impact (Low/Med/High):
Mitigation Strategy (How to reduce risk):
Owner (responsible person):

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Responsible, Accountable, Consulted, and Informed (RACI)

Chart Template

Task/Deliverable (Project Task):
Responsible (Person who does the work):
Accountable (Decision maker):
Consulted (Key contributors):
Informed (Kept in the loop):

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Communication Plan Outline

AUDIENCE (Stakeholder group):
Message (What is being communicated):
Frequency (how often):
Channel (email, meeting, etc.):
Owner (who is responsible):

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3. Project Execution (Deliver the project as planned while managing team and stakeholders.)

- a) Kick off the project with the team.
- b) Assign and track tasks.
- c) Monitor milestones and deadlines.
- d) Conduct status meetings.

Forms:

- Kickoff Meeting Agenda
- Task Assignment Sheet
- Weekly Status Report Template
- Change Request Form

Kickoff Meeting Agenda

Agenda Item (Topic):
Time (Duration):
Presenter (Who leads this section):
Notes (Key discussion points):

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Task Assignment Sheet

Task (Assigned work item):
Owner (responsible person):
Due Date (deadline):
Status (not started/in progress/done):

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Weekly Status Report Template

Week Ending (Date):
Accomplishments (what was completed):
Issues (current roadblocks):
Next Steps (upcoming priorities):
Support Needed (requests to leadership):

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Change Request Form

Change ID (Unique ID):
Requested by (person or department):
Description (what is changing and why):
Impact (effect on scope/time/budget):
Approval Status (Pending/Approved/Denied):

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4. Project Monitoring & Controlling (Ensure the project stays on track and aligned with goals.)

- a) Monitor KPIs and project metrics.
- b) Manage scope, time, and cost changes.
- c) Adjust risk strategies as needed.
- d) Update stakeholders regularly.

Forms:

- Performance Dashboard Template
- Issue Log
- Scope Change Log
- Budget Tracking Sheet

Performance Dashboard Template

KPI (Key Performance Indicator):
Target (Goal):
Current Value (as of today):
Status (On track/at risk/off track):
Owner (responsible party):

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Issue Log

Issue ID (Unique Number):
Description (What is the issue):
Priority (Low/Medium/High):
Owner (assigned person):
Status (Open/Resolved/Closed):

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Scope Change Log

Change ID (Unique ID):
Description (Change request):
Reason (Why it's needed):
Impact (Effect on project):
Approval (Approved/Rejected):

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Budget Tracking Sheet

CATEGORY (Expense Type):
Planned cost (budgeted amount):
Actual cost (spent to date):
Variance (difference):
Notes (Explanation):

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5. Project Closure (Wrap up the project, document lessons learned, and release resources.)

- a) Conduct final deliverable review.
- b) Gather team feedback.
- c) Hold post-project review.
- d) Archive documents and release team.

Forms:

- Project Close-Out Checklist
- Lessons Learned Report
- Final Project Report Template
- Team Feedback Survey

Project Close-Out Checklist

TASK (Close-out Activity):
Owner (Assigned person):
Due date (deadline):
Completed (mark Yes or No):

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Lessons Learned Report

AREA (Project Phase/Topic):
What went well (successes):
What didn't go well (challenges):
Recommendations (future improvements):

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Final Project Report Template

PROJET NAME (TITLE):
Summary (overview of results):
Budget performance (under/on/over budget):
Timeline Performance (met deadlines?):
Outcomes (results achieved):

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Team Feedback Survey

QUESTION (Feedback topic):
Rating (1-5 Scale):
Comments (Optional Notes):

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