The Top 5 Project Documents

"Empowering Managers to succeed"

Part of every project manager's job is to keep good documentation. In doing so, a project manager becomes the repository and historian of project knowledge as people's memories begin to fade. But, there are so many project documents to maintain. Which ones are the most important to keep a project moving forward? Learn here the...

The Top 5 Project Documents

If you use the documents as a starting point for keeping up with your projects, then you will be well on the way to being highly valued and appreciated within your company.

The Project Charter

The project charter can be considered the green light for the project to move forward. Project activity can begin once the project charter has been assembled and approved. The purpose of this document is to outline the reasons and objectives for undertaking the project, items that would be considered in-scope or out-of scope, target project benefits, and most importantly a high-level budget and who has the authority to expend these resources.

The project charter also serves as a stabilizing force once the project is underway. There are going to be opinions and ideas of what aspects of a project should be left in and which should be removed. These opinions and ideas creep in based upon managers and resources personal preferences. The project charter can serve as a reference point for the original intent of the project and to ensure the project does not succumb to scope creep.

The Project Schedule

The project schedule is the next must-have document to effectively run a project. The very definition of a project (a temporary endeavor with a defined beginning and end undertaken to meet unique goals and objectives) speaks to the importance of the project schedule. The project schedule takes the beginning and end of the project and breaks it down into project phases and then ultimately project tasks. Each task is assigned duration, resource, and whether it is dependent upon a previous task or activity prior to its start. This document then serves as the baseline for whether the project is on track and meeting its target dates or if there needs to be some adjustments made to the schedule.

The Status Report

It's important to keep everyone informed as to how things are progressing on the project once everything gets underway. There's no better way to do this than putting together a status report. A status report should contain the answers to these four questions:

- What has been accomplished on this project since the last status report?
- What is next to be done on this project?
- What stands in the way of this project being complete?
- Are there any special needs this project has that must be discussed?

A status report does not need to be overwhelming to put together and it should always be easy to read. It's good to come up with some type of status code (for example...Green, Yellow, Red always works well) that can quickly provide an overall status of the project at one quick glance. If an executive sees everything is Green he won't give the project a second thought. If the status is slipping into Yellow or Red, then the executive knows they must get involved at this point.

The Risk Register

Your job as a project manager is to get the project done. However, there are powerful forces at work whose sole purpose is to prevent you from getting your project done. These forces are known as Risks. These risks could range from a critical resource getting sick on your project to a key vendor going out of business.

You need to call these risks out on a regular basis and prevent them from turning into full-blown issues that can wreak havoc on your project. There's no better place to do this than the Risk Register. This document identifies potential risks and categorizes them by probability of occurring and the severity of their impact to the project if they do occur. Plus, there needs to be a mitigation strategy coupled with each risk as to what is being done to prevent this risk from occurring.

The Communications Plan

The final document every project must have is a communication plan. There are so many things going on with a project that is going full-steam ahead it's hard to remember who needs to know what and when they need to know it. A well-thought out communication plan will minimize any miscommunication that could occur and keep everyone on the same page.

For more information about specific guidance or tools on project management, please send a request to info@esteemconsults.com