***Instructions:*** *Replace italicized items below. Items listed under “Document Name” are examples of documents which should be archived. List a link to the document archive location.*

|  |  |
| --- | --- |
|  | **Description** |
| **Project Name** | *[Project name]* |
| **Project Description** | *[Description of project]* |
| **Project Manager** | *[Project Manager name]* |
| **Business Owner** | *[Business Owner name]* |
| **General Comments** | *[Any additional general comments]* |

**Small Projects (add other requirements below)**

|  |  |  |
| --- | --- | --- |
| **Document Name** | **Description** | **Location** |
| *Business case* |  |  |
| *Project level assessment* |  |  |
| *Project charter* |  |  |
| *Stakeholder roles & responsibilities* |  |  |
| *Kick off meeting agenda & minutes* |  |  |
| *Work breakdown structure (WBS)* |  |  |
| *Communication plan* |  |  |
| *Staffing plan* |  |  |
| *Schedule* |  |  |
| *Budget* |  |  |
| *Risk register* |  |  |
| *Issue Log* |  |  |
| *Change impact statement* |  |  |
| *Status reports* |  |  |
| *Project acceptance document* |  |  |
| *Document register* |  |  |
| *Lessons learned* |  |  |
| *Benefits realization register* |  |  |
| *Benefits realization report* |  |  |
| *Other:* |  |  |

**Medium Projects (add other requirements below)**

|  |  |  |
| --- | --- | --- |
| **Document Name** | **Description** | **Location** |
| *Business case with alternatives* |  |  |
| *Scope statement* |  |  |
| *Project organization* |  |  |
| *Stakeholder engagement plan* |  |  |
| *Risk register with risk responses* |  |  |
| *Status meeting requirements* |  |  |
| *Benefits tracking* |  |  |
| *Change impact assessment* |  |  |
| *Change message* |  |  |
| *Status meetings* |  |  |
| *Individual performance assessments* |  |  |
| *Change control* |  |  |
| *Quality assurance* |  |  |
| *Training plan* |  |  |
| *Transition plan* |  |  |
| *Project assessment* |  |  |
| *Benefits realization report with measurements* |  |  |
| *Other:* |  |  |

 **Large Projects (add other requirements below)**

|  |  |  |
| --- | --- | --- |
| **Document Name** | **Description** | **Location** |
| *Feasibility study* |  |  |
| *Stakeholder analysis* |  |  |
| *Quantitative risk analysis* |  |  |
| *Acquisition plan* |  |  |
| *Change management plan* |  |  |
| *Project management plan* |  |  |
| *Quality measurements* |  |  |
| *Risk management* |  |  |
| *Operations handover* |  |  |
| *Other:* |  |  |