## Document Control

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</thead>
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### Distribution

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<thead>
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<th>Title</th>
<th>Document Version</th>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
</table>
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Introduction</td>
</tr>
<tr>
<td>2.1</td>
<td>MS Word</td>
</tr>
<tr>
<td>2.2</td>
<td>MS Word</td>
</tr>
<tr>
<td>3.1</td>
<td>MS Excel</td>
</tr>
<tr>
<td>3.2</td>
<td>MS Excel</td>
</tr>
<tr>
<td>3.3</td>
<td>MS Excel</td>
</tr>
<tr>
<td>4.1</td>
<td>MS Excel</td>
</tr>
<tr>
<td>5.1</td>
<td>MS Excel</td>
</tr>
<tr>
<td>5.2</td>
<td>MS Excel</td>
</tr>
<tr>
<td>6.1</td>
<td>MS Excel</td>
</tr>
<tr>
<td>6.2</td>
<td>MS Excel</td>
</tr>
<tr>
<td>6.3</td>
<td>MS Excel</td>
</tr>
<tr>
<td>6.4</td>
<td>MS Excel</td>
</tr>
<tr>
<td>7.1</td>
<td>MS Excel</td>
</tr>
<tr>
<td>8.1</td>
<td>MS Excel</td>
</tr>
<tr>
<td>9.1</td>
<td>MS PowerPoint</td>
</tr>
<tr>
<td>9.2</td>
<td>MS PowerPoint</td>
</tr>
<tr>
<td>9.3</td>
<td>MS PowerPoint</td>
</tr>
</tbody>
</table>
9.4 MS PowerPoint | Example PPT Plan on a Page (POaP) for end-to-end software delivery (SDLC) (4) .................................................................................................................. 24
9.5 MS PowerPoint | Example PPT Plan on a Page (POaP) for end-to-end software delivery (SDLC) (5) .................................................................................................................. 25
9.6 MS PowerPoint | Example PPT Plan on a Page (POaP) for end-to-end software delivery costing (6) .................................................................................................................. 26
9.7 MS PowerPoint | Example PPT Plan on a Page (POaP) for end-to-end, multiple App delivery (7) .................................................................................................................. 27
9.8 MS PowerPoint | Example PPT Plan on a Page (POaP) for end-to-end, multiple App delivery (8) .................................................................................................................. 28
10.1 MS Project | Example MPP Detailed Plan for end-to-end App to Cloud Re-platform / Re-host delivery with timeline view ............................................................ 29
11.1 MS Project | Example MPP Detailed Plan for end-to-end software delivery (SDLC) ................................................................................................................................. 30
12.1 MS Project | Example MPP Detailed Plan for multiple App Refactor delivery to MS Power Platform ........................................................................................................ 31
13.1 MS Project | Example MPP Detailed Plan for full software development lifecycle (SDLC) with full timeline view .................................................................................. 32
14.1 MS Project | Example MPP Detailed Plan for full software development lifecycle (SDLC) with simple timeline view .................................................................................. 33
15.1 MS Project | Example PRINCE2 MPP MS Project Plan for project delivery using 2 example managed stages with timeline view .......................................................................... 34
16.1 MS Project | Example MPP MS Project Plan for a full App to Cloud Re-platform / Re-host migration .................................................................................................................. 35
17.1 MS Project | Example MPP MS Project Detailed Plan with annotations for end-to-end software delivery (SDLC) .................................................................................................. 36
18.1 MS Excel | Simple Monthly Finance Tracker for Project Forecasts, Actuals, Variance, Annual Leave etc. ................................................................................................................. 37
18.2 MS Excel | Simple Monthly Finance Tracker including charts tab (2) .................................................................................................................. 38
19.1 MS Excel | Full Project Finance Tracker including forecasts, actuals, variance, rate look-up and charts tab etc. ............................................................................................................. 39
19.2 MS Excel | Full Project Finance Tracker including forecasts, actuals, variance, rate look-up and charts tab etc. (2) ......................................................................................................... 40
19.3 MS Excel | Full Project Finance Tracker including forecasts, actuals, variance, rate look-up and charts tab (3) ......................................................................................................... 41
19.4 MS Excel | Full Project Finance Tracker including forecasts, actuals, variance, rate look-up and charts tab (4) ......................................................................................................... 42
| 19.5 | MS Excel | Full Project Finance Tracker including forecasts, actuals, variance, rate look-up and pivots (5) | 43 |
| 19.6 | MS Excel | Full Project Finance Tracker including complete annual leave tracker (6) | 44 |
| 20.1 | MS Excel | Simple Project Finance Tracker for Forecasts, Actuals, Variance plus charts | 45 |
| 20.2 | MS Excel | Simple Project Finance Tracker for Forecasts, Actuals, Variance plus charts (2) | 46 |
| 21.1 | MS Excel | Project / Programme / Bid costing spreadsheet for multiple project waves / resources | 47 |
| 22.1 | MS Excel | Agile (Scrum) Sprint Burn Down Table for a 2-weekly Sprint to be tailored as required | 48 |
| 22.2 | MS Excel | Agile (Scrum) Sprint Burn Down Chart for a 2-weekly Sprint to be tailored as required (2) | 49 |
| 22.3 | MS Excel | Agile Sprints Burn Up Chart for a Project Delivery to be tailored as required (3) | 50 |
| 23.1 | MS Excel | Agile Sprints Tracker Log for Client Blocked Sprint stories/tasks where many external dependencies exist | 51 |
| 24.1 | MS Excel | Simple RAID log for all Risks, Assumptions, Issues, Dependencies etc. | 52 |
| 25.1 | MS Excel | Comprehensive RAID and tracker log for RAIDs, Suppliers, Deliverables, Change Requests, Out-of-Scope (OOS) tasks etc. | 53 |
| 25.2 | MS Excel | Comprehensive RAID and tracker log for RAIDs plus others including charts (2) | 54 |
| 26.1 | MS Excel | Multiple Project Wave RAID tracker log for Programme delivery | 55 |
| 27.1 | MS Excel | Example Weekly Status Report including Plan on a Page and RAID logs etc. for software delivery | 56 |
| 28.1 | MS PowerPoint | Example Weekly / Monthly Status Report for both internal / external reporting of all project status | 57 |
| 29.1 | MS PowerPoint | Example Weekly Status Report for both internal / external reporting of project status | 58 |
| 30.1 | MS Word | Example Weekly Status Report for both internal / external reporting of project status | 59 |
| 31.1 | MS Word | Guide to using the Free Planner and To Do App in MS Teams for Project Delivery | 60 |
| 32.1 | MS PowerPoint | Example Project Organization Charts (Org Chart) and PPT Wizard Build Example | 61 |
| 33.1 | MS Excel | Example RACI (Responsible, Accountable, Consulted, Informed) Resource and Task Tracker

| 34.1 | MS Excel | Resource Full Annual Leave Tracker including Sick Leave, Training, time off-project etc. plus charts tab

| 35.1 | MS Excel | Example Programme / Project on-boarding resource status tracker with pivots

| 36.1 | MS Excel | Stakeholder Analysis Tracker for adding weightings to project resources for RACI analysis

| 36.2 | MS Excel | Stakeholder Analysis Tracker for adding weightings to project resources for RACI analysis (2)

| 37.1 | MS Excel | Benefits Realization Analysis tracker spreadsheet to compare project goals with business outcomes, costs etc.

| 38.1 | MS Word | Programme / Project Meeting Minutes, example document format

| 39.1 | MS Excel | Simple App Functional (and UAT) example testing scripts for use on software projects

| 40.1 | MS Word | Example Application Test Plan for functional testing on software delivery projects

| 41.1 | MS Excel | Example Testing observations log for User Acceptance Testing (UAT) project phase

| 42.1 | MS Excel | Example Home / Domestic Finance Tracker with charts for all domestic outgoings

| 42.2 | MS Excel | Example Home / Domestic Finance Tracker with charts for all domestic outgoings (2)

| 42.3 | MS Excel | Example Home / Domestic Finance Tracker with charts for all domestic outgoings (3)

| 42.4 | MS Excel | Example Home / Domestic Finance Tracker with charts for all domestic outgoings (4)

| 50.1 | Appendices |
1.1 Introduction

This document provides an inventory and gallery of all the project management templates in the accompanying ZIP file package.

Screenshots call also be accessed at the following website link:

https://mark-whitfield.com/about/prince2-project-templates-download/agile-prince2-project-management-templates-gallery/

All upgrades to updated/added project management templates are FREE after your first purchase.

Join the FREE PM templates related ;

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LinkedIn Group
https://www.linkedin.com/groups/163300
2.1 MS Word | Walkthrough Document describing the key Project Management Templates provided in ZIP file

Screenshot 1:

This document (above) provides a step-by-step walk-through guide to the accompanying:

1. Detailed Software Development Life-cycle (SDLC) Microsoft Project Plan MPP template
2. PowerPoint SDLC Plan on a Page template
3. Detailed SDLC Excel Project Plan template
4. Project Financial Tracker for internal and external costs including forecast and actuals, annual leave, margin, variation, expenses and accompanying charts
5. Comprehensive RAIDs log (Risk, Action, Issue, Dependency, Supplier costs, Expense costs and Change Request tabs) and accompanying charts
6. Walk-through Word format document for each of the above templates (this document)
2.2 MS Word | Walkthrough Document describing the key Project Management Templates provided (2)

Screenshot 2:

This document (above) provides a step-by-step walk-through guide to the accompanying:

1. Detailed Software Development Life-cycle (SDLC) Microsoft Project Plan MPP template
2. PowerPoint SDLC Plan on a Page template
3. Detailed SDLC Excel Project Plan template
4. Project Financial Tracker for internal and external costs including forecast and actuals, annual leave, margin, variation, expenses and accompanying charts
5. Comprehensive RAIDs log (Risk, Action, Issue, Dependency, Supplier costs, Expense costs and Change Request tabs) and accompanying charts
6. Walk-through Word format document for each of the above templates (this document)
3.1 MS Excel | Detailed PRINCE2 Waterfall Project Planner with Gannt View for those without MS Project

Screenshot 3:

An MS Excel PRINCE2 project task tracker and dashboard spreadsheet for checking task status and progress with the client and project team. Includes task, baseline start date, baseline finish date, forecast start date, forecast finish date, status, percent complete, allocated resource and comments.

The ZIP file pack also contains a Microsoft Project MPP file template for PRINCE2 2017 (it also contains an MS Excel PRINCE2 project plan as a XLS spreadsheet). This can be tailored as required based on the seventh principle of PRINCE2. The Microsoft Project MPP file template for PRINCE2 2017 contains all the stages and activities required by PRINCE2 including all the artefacts required for creation and updating across the project life cycle.

Each row is annotated with a description of the activity / task in the notes section for the task.
3.2 MS Excel | Detailed PRINCE2 Waterfall Project Planner with Gannt View for those without MS Project (2)

Screenshot 4:

An MS Excel PRINCE2 project task tracker and dashboard spreadsheet for checking task status and progress with the client and project team. Includes task, baseline start date, baseline finish date, forecast start date, forecast finish date, status, percent complete, allocated resource and comments.

The ZIP file pack also contains a Microsoft Project MPP file template for PRINCE2 2017 (it also contains an MS Excel PRINCE2 project plan as a XLS spreadsheet). This can be tailored as required based on the seventh principle of PRINCE2. The Microsoft Project MPP file template for PRINCE2 2017 contains all the stages and activities required by PRINCE2 including all the artefacts required for creation and updating across the project life cycle.

Each row is annotated with a description of the activity / task in the notes section for the task.
3.3 MS Excel | Detailed PRINCE2 Waterfall Project Planner with Chart View tab included (3)

Screenshot 5:

A PRINCE2 project task tracker and dashboard spreadsheet for checking task status and progress with the client and project team. Includes task, baseline start date, baseline finish date, forecast start date, forecast finish date, status, percent complete, allocated resource and comments.
4.1  MS Excel | Project Task Tracker for both Agile and PRINCE2 Waterfall project delivery to the client

Screenshot 6:

Project Task Tracker for both Agile and PRINCE2 Waterfall project delivery to the client.
5.1 MS Excel | Detailed Project Planner and Resource Costing Grid for bids and new project phases

Screenshot 7:

A useful plan on a page (POaP) Excel spreadsheet which incorporates both resource allocation and costings aligned across the project timeline. This is useful when constructing Statements of Work (SoW) or working on bids and trying to establish broad stroke costs and time to completion for the project.
A useful project planner spreadsheet in Excel which essentially presents an alternative to MS Project where either the project manager, client or both don’t have or don’t want to use MS Project (MSP, MPP) for tracking the project tasks and status. This spreadsheet is essentially MS Project represented in an Excel spreadsheet with much of the detail that is required in a comprehensive project plan including charts and resource costings calculated across and aligned to the project timeline.
6.1 MS Excel | Detailed Waterfall Project Planner with Gannt View for those without an MS Project license

Screenshot 9:

A project task tracker and dashboard spreadsheet for checking task status and progress with the client and project team. Includes task, baseline start date, baseline finish date, forecast start date, forecast finish date, status, percent complete, allocated resource and comments.
6.2 MS Excel | Detailed Waterfall Project Planner with Gannt View for those without MS Project (2)

Screenshot 10:

A project task tracker and dashboard spreadsheet for checking task status and progress with the client and project team. Includes task, baseline start date, baseline finish date, forecast start date, forecast finish date, status, percent complete, allocated resource and comments.
6.3 MS Excel | Detailed Project Planner with costings view for Project Resource costing per project phase (3)

Screenshot 11:

A project task tracker and dashboard spreadsheet for checking task status and progress with the client and project team. Includes task, baseline start date, baseline finish date, forecast start date, forecast finish date, status, percent complete, allocated resource and comments.
6.4 MS Excel | Detailed Project Planner with Charts Tab View included (4)

Screenshot 12:

A project task tracker and dashboard spreadsheet for checking task status and progress with the client and project team. Includes task, baseline start date, baseline finish date, forecast start date, forecast finish date, status, percent complete, allocated resource and comments.
7.1 MS Excel | Example project tasks for end-to-end Software Delivery (SDLC) to aid detailed planning

Screenshot 13:

A list of project tasks/stories from the MS Project MPP files (for those who do not have MS Project) to consider and discuss with the team when setting up a Software Development Lifecycle Project (SDLC). Two Excel project planners are included in this folder, which can be tailored/customised as appropriate if you do not have MS Project or you/your client prefer Excel.
8.1 MS Excel | Example PRINCE2 project tasks for end-to-end project delivery using PRINCE2 to aid detailed planning

Screenshot 14:

A list of PRINCE2 project tasks/stories from the MS Project MPP PRINCE2 file (for those who do not have MS Project) to consider and discuss with the team when setting up a PRINCE2 Software Development Life-cycle Project (SDLC). Two Excel project planners are included in this folder, which can be tailored/customised as appropriate if you do not have MS Project or you/your client prefer Excel.
9.1 MS PowerPoint | Example PPT Plan on a Page (POaP) for end-to-end software delivery (SDLC)

Screenshot 15:

PowerPoint SDLC Plan on a Page (POaP) templates which includes a number of slides illustrating different ways to show a project plan on a page (over 15 included).
PowerPoint SDLC Plan on a Page (POaP) templates which includes a number of slides illustrating different ways to show a project plan on a page (over 15 included).
9.3 MS PowerPoint | Example PPT Plan on a Page (POaP for end-to-end software delivery (SDLC) (3)

Screenshot 17:

PowerPoint SDLC Plan on a Page (POaP) templates which includes a number of slides illustrating different ways to show a project plan on a page (over 15 included).
PowerPoint SDLC Plan on a Page (POaP) templates which includes a number of slides illustrating different ways to show a project plan on a page (over 15 included).
PowerPoint SDLC Plan on a Page (POaP) templates which includes a number of slides illustrating different ways to show a project plan on a page (over 15 included).
9.6  MS PowerPoint | Example PPT Plan on a Page (POaP) for end-to-end software delivery costing (6)

Screenshot 20:

PowerPoint SDLC Plan on a Page (POaP) templates which includes a number of slides illustrating different ways to show a project plan on a page (over 15 included).
PowerPoint SDLC Plan on a Page (POaP) templates which includes a number of slides illustrating different ways to show a project plan on a page (over 15 included).
9.8 MS PowerPoint | Example PPT Plan on a Page (POaP) for end-to-end, multiple App delivery (8)

Screenshot 22:

PowerPoint SDLC Plan on a Page (POaP) templates which includes a number of slides illustrating different ways to show a project plan on a page (over 15 included).
10.1 MS Project | Example MPP Detailed Plan for end-to-end App to Cloud Re-platform / Re-host delivery with timeline view

Screenshot 23:

Example MPP Detailed Plan for end-to-end App to Cloud Re-platform / Re-host delivery with timeline view.
11.1 MS Project | Example MPP Detailed Plan for end-to-end software delivery (SDLC)

Screenshot 24:

Example MPP Detailed Plan for end-to-end software delivery (SDLC).
12.1 MS Project | Example MPP Detailed Plan for multiple App Refactor delivery to MS Power Platform

Screenshot 25:

Example MPP Detailed Plan for multiple App Refactor delivery to MS Power Platform.
13.1 MS Project | Example MPP Detailed Plan for full software development lifecycle (SDLC) with full timeline view

Screenshot 26:

Example MPP Detailed Plan for full software development lifecycle (SDLC) with full timeline view.
14.1 MS Project | Example MPP Detailed Plan for full software development lifecycle (SDLC) with simple timeline view

Screenshot 27:

Example MPP Detailed Plan for full software development lifecycle (SDLC) with simple timeline view.
15.1 MS Project | Example PRINCE2 MPP MS Project Plan for project delivery using 2 example managed stages with timeline view

Screenshot 28:

PRINCE2 2017 – MS Project Plan Template (both MS Excel and MS Project MPP)

The ZIP file pack contains a Microsoft Project MPP file template for PRINCE2 2017 (it also contains an MS Excel PRINCE2 project plan as a XLS spreadsheet). This can be tailored as required based on the seventh principle of PRINCE2. The Microsoft Project MPP file template for PRINCE2 2017 contains all the stages and activities required by PRINCE2 including all the artefacts required for creation and updating across the project life cycle.

Each row is annotated with a description of the activity / task in the notes section for the task.

The font colour represents the task requirement as follows:

- **Black** – a traditional PRINCE2 typical stage / activity
- **Blue** – the creation of a particular PRINCE2 artefact, e.g. lessons, issue, risk, benefits log
- **Brown** – an event or decision required, typically from the ‘Directing a project’ stage
- **Purple** – the updating of a particular PRINCE2 artefact, e.g. lessons, issue, risk, benefits log
- **Green** – the closing of a particular PRINCE2 artefact, e.g. lessons, issue, risk, benefits log
16.1 MS Project | Example MPP MS Project Plan for a full App to Cloud Re-platform / Re-host migration

Screenshot 29:

Example MPP MS Project Plan for a full App to Cloud Re-platform / Re-host migration.
17.1 MS Project | Example MPP MS Project Detailed Plan with annotations for end-to-end software delivery (SDLC)

Screenshot 30:

The project plan follows a typical Software Development Lifecycle (SDLC) progression through to traditional software test phase cycles, deployment and Early Live Support (ELS).

Each Sprint (in the Construction section) can be updated as Sprint backlog stories become known for software deliverables (if necessary or kept generic as just numbered sprints). If Agile entries are deleted from the plan in favour of a Waterfall approach, software/document deliverables can be added in their place in their respective sequence of delivery. The plan contains a Comments column for further information to be added as required to explain the purpose of a task entry. Some comments have already been added.
18.1 MS Excel | Simple Monthly Finance Tracker for Project Forecasts, Actuals, Variance, Annual Leave etc.

Screenshot 31:

Spreadsheet for tracking project monthly financials including contracted work, forecasts, actuals, variance, expenses, suppliers, annual leave plus appropriate charts.
18.2 MS Excel | Simple Monthly Finance Tracker including charts tab (2)

Screenshot 32:

Spreadsheet for tracking project monthly financials including contracted work, forecasts, actuals, variance, expenses, suppliers, annual leave plus appropriate charts.
19.1 MS Excel | Full Project Finance Tracker including forecasts, actuals, variance, rate look-up and charts tab etc.

Screenshot 33:

Comprehensive table spreadsheet for tracking project monthly financials including summary view tab, contracted work, forecasts, actuals, variance, expenses, annual leave, suppliers, pivot tab.
19.2 MS Excel | Full Project Finance Tracker including forecasts, actuals, variance, rate look-up and charts tab etc. (2)

Screenshot 34:

Comprehensive table spreadsheet for tracking project monthly financials including summary view tab, contracted work, forecasts, actuals, variance, expenses, annual leave, suppliers, pivot tab.
19.3 MS Excel | Full Project Finance Tracker including forecasts, actuals, variance, rate look-up and charts tab (3)

Screenshot 35:

Comprehensive table spreadsheet for tracking project monthly financials including summary view tab, contracted work, forecasts, actuals, variance, expenses, annual leave, suppliers, pivot tab.
19.4 MS Excel | Full Project Finance Tracker including forecasts, actuals, variance, rate look-up and charts tab (4)

Screenshot 36:

Comprehensive table spreadsheet for tracking project monthly financials including summary view tab, contracted work, forecasts, actuals, variance, expenses, annual leave, suppliers, pivot tab.
### 19.5 MS Excel | Full Project Finance Tracker including forecasts, actuals, variance, rate look-up and pivots (5)

**Screenshot 37:**

![Excel Project Finance Tracker Screenshot](image)

Comprehensive table spreadsheet for tracking project monthly financials including summary view tab, contracted work, forecasts, actuals, variance, expenses, annual leave, suppliers, pivot tab.
19.6 MS Excel | Full Project Finance Tracker including complete annual leave tracker (6)

Screenshot 38:

Comprehensive table spreadsheet for tracking project monthly financials including summary view tab, contracted work, forecasts, actuals, variance, expenses, annual leave, suppliers, pivot tab.
20.1 MS Excel | Simple Project Finance Tracker for Forecasts, Actuals, Variance plus charts

Screenshot 39:

Spreadsheet for tracking project monthly financials including contracted work, forecasts, actuals, variance, expenses, suppliers, annual leave plus appropriate charts.
20.2 MS Excel | Simple Project Finance Tracker for Forecasts, Actuals, Variance plus charts (2)

Screenshot 40:

Spreadsheet for tracking project monthly financials including contracted work, forecasts, actuals, variance, expenses, suppliers, annual leave plus appropriate charts.
21.1 MS Excel | Project / Programme / Bid costing spreadsheet for multiple project waves / resources

Screenshot 41:

Spreadsheet for building resource costs for a multi wave, programme statement of work (SoW) including assumptions, scope of work per wave, deliverables and estimated OpEx savings.
22.1 MS Excel | Agile (Scrum) Sprint Burn Down Table for a 2-weekly Sprint to be tailored as required

Screenshot 42:

An example Agile Burn Down Chart and Burn Up Chart in Excel where there is no access to Agile tools like Jira. Tailor this Excel spreadsheet as appropriate for your Agile Scrum project.
22.2 MS Excel | Agile (Scrum) Sprint Burn Down Chart for a 2-weekly Sprint to be tailored as required (2)

Screenshot 43:

An example Agile Burn Down Chart and Burn Up Chart in Excel where there is no access to Agile tools like Jira. Tailor this Excel spreadsheet as appropriate for your Agile Scrum project.
22.3 MS Excel | Agile Sprints Burn Up Chart for a Project Delivery to be tailored as required (3)

Screenshot 44:

An example Agile Burn Down Chart and Burn Up Chart in Excel where there is no access to Agile tools like Jira. Tailor this Excel spreadsheet as appropriate for your Agile Scrum project.
23.1 MS Excel | Agile Sprints Tracker Log for Client Blocked Sprint stories/tasks where many external dependencies exist

Screenshot 45:

A useful Agile tracker for client facing projects. A number of Agile stories will have hard internal or Client/Customer dependencies and cannot progress without some Client/Customer work for say, unblocking firewalls or some Client supplier management for ensuring API connectivity across middleware/platforms.

Not all stories need to be tracked of course but those that have a dependency on another project stakeholder(s) may need much closer tracking. This especially if there is a need for a project change request which incurs cost due to unfulfilled Customer dependencies (delays). This tracker (along with the RAIDs log) becomes a useful audit trail of activity for the Agile project to detail reasons for the need for a project change request.
24.1 MS Excel | Simple RAID log for all Risks, Assumptions, Issues, Dependencies etc.

Screenshot 46:

Example simple RAIDs log template which can be used to track Risks, Assumptions, Issues and Dependencies (and other lists) for the project.
25.1 MS Excel | Comprehensive RAID and tracker log for RAIDs, Suppliers, Deliverables, Change Requests, Out-of-Scope (OOS) tasks etc.

Screenshot 47:

Example RAIDs log template which can be used to track Risks, Assumptions, Issues and Dependencies (and other lists) for the project. There is also a more basic RAIDs log included in the pack so you can choose which is the most appropriate.
25.2 MS Excel | Comprehensive RAID and tracker log for RAIDS plus others including charts (2)

Screenshot 48:

Example RAIDs log template which can be used to track Risks, Assumptions, Issues and Dependencies (and other lists) for the project. There is also a more basic RAIDs log included in the pack so you can choose which is the most appropriate.
26.1 MS Excel | Multiple Project Wave RAID tracker log for Programme delivery

Screenshot 49:

Example Wave, Programme RAIDs log template which can be used to track Risks, Assumptions, Issues and Dependencies (and other lists) for the Programme. This RAID log includes a tab for each Wave of a Programme of work and offers a concise way of tracking RAIDs per stream of work.

*There is also a more basic RAIDs log included in the pack so you can choose which is the most appropriate.*
27.1 MS Excel | Example Weekly Status Report including Plan on a Page and RAIDs log etc. for software delivery

Example Weekly Status Report including Plan on a Page and RAIDs log etc. for software delivery.
28.1 MS PowerPoint | Example Weekly / Monthly Status Report for both internal / external reporting of all project status

Screenshot 51:

A good weekly / monthly project status report for client and internal reporting of project health. Includes title page, contents, management summary, decisions required, project status, progress and priorities, milestone status, plan on a page (POaP), key risks and issues, risks matrix, issues matrix, change control and next update slide.
A good weekly project status report to summarise progress this week, plans for next week, risks and issues, milestone dashboard and the plan on a page (POaP).
30.1 MS Word | Example Weekly Status Report for both internal / external reporting of project status

Screenshot 53:

A comprehensive Microsoft Word format weekly status report which includes project summary, progress this week, plans for next week, risks, issues, dependencies, client obligations, decisions made, deliverables, change requests etc.
31.1 MS Word | Guide to using the Free Planner and To Do App in MS Teams for Project Delivery

Screenshot 54:

Walkthrough guide to using MS Teams Free Planner and To Do App for tracking Agile projects.
32.1 MS PowerPoint | Example Project Organization Charts (Org Chart) and PPT Wizard Build Example

Screenshot 55:

Various PowerPoint slide examples of resource organisation hierarchies / charts. The slides also include a ‘build your own’ slide which makes use of the org chart PowerPoint wizard (see screenshot above).
A good RACI project template. RACI is an acronym for responsible, accountable, consulted and informed. A RACI chart is a way to assign responsibility and roles to team members who are tasked with creating deliverables in a project. It defines their roles and responsibilities in the team and the overall project. It’s a simple tool that takes each task in a project and assigns the roles and responsibilities attached to it. This makes it clear who is doing what in the project and avoids any confusion, which can slow down production and eat into costs.

**Responsible**
Each task must have at least one responsible team member who is the one who does the work to complete the task. There can be, however, more than one responsible party.

**Accountable**
This team member is in charge of delegating work and is the one who approves deliverables before they can be deemed complete. Sometimes the responsible team member is also the accountable one. But every task must have one accountable person attached to it, and it’s not always the project manager.

**Consulted**
This team member will review a deliverable, providing feedback that puts the deliverable in context to the whole project or just within its own expectations.

**Informed**
These are the team members who must know what’s happening with the execution of tasks, but are not wedded to them with the same level of responsibility as those listed above. They can be given a general report on progress, rather than having to dip into the weeds with them.
34.1 MS Excel | Resource Full Annual Leave Tracker including Sick Leave, Training, time off-project etc. plus charts tab

Screenshot 57:

A comprehensive annual leave spreadsheet for tracking resource allocation and time on a project. Also includes a table pivot and charts for easy read out of annual leave to date along with sick leave and other time off project.
35.1 MS Excel | Example Programme / Project on-boarding resource status tracker with pivots

Screenshot 58:

A resource on-boarding and look-up spreadsheet for recording resource location, department, full or part time, role, line manager, cost, grade, start date etc.
36.1 MS Excel | Stakeholder Analysis Tracker for adding weightings to project resources for RACI analysis

Screenshot 59:

A spreadsheet for tracking client project stakeholders including a bitmap to plot influence and impact (inform, engage, consult, involve) of the stakeholder on the project direction and decision making. Includes all typical stakeholder information and can also be used as a contacts list as the project progresses.
36.2 MS Excel | Stakeholder Analysis Tracker for adding weightings to project resources for RACI analysis (2)

Screenshot 60:

A spreadsheet for tracking client project stakeholders including a bitmap to plot influence and impact (inform, engage, consult, involve) of the stakeholder on the project direction and decision making. Includes all typical stakeholder information and can also be used as a contacts list as the project progresses.
37.1 MS Excel | Benefits Realization Analysis tracker spreadsheet to compare project goals with business outcomes, costs etc.

Screenshot 61:

Spreadsheet template for recording project benefits including benefit name and description, current baseline measurement, target realisation start date, target realisation completion date, realisation certainty RAG (red amber green status), realisation profile and benefit owners and sign-off.
38.1 MS Word | Programme / Project Meeting Minutes, example document format

Screenshot 62:

A good word template for minuting project meetings including agenda items, questions and next steps, previous action items, new action items, key discussion points and decisions and the date of the next meeting.
Simple App Functional (and UAT) example testing scripts for use on software projects.
40.1 MS Word | Example Application Test Plan for functional testing on software delivery projects

Screenshot 64:

Example Application Test Plan for functional testing on software delivery projects.
41.1 MS Excel | Example Testing observations log for User Acceptance Testing (UAT) project phase

Screenshot 65:

Example Testing observations log for User Acceptance Testing (UAT) project phase.
42.1 MS Excel | Example Home / Domestic Finance Tracker with charts for all domestic outgoings

Screenshot 66:

A spreadsheet for tracking home finances and outgoings with charts and pivot tables.
### 42.2 MS Excel | Example Home / Domestic Finance Tracker with charts for all domestic outgoings (2)

Screenshot 67:

![Screenshot of MS Excel spreadsheet](image)

A spreadsheet for tracking home finances and outgoings with charts and pivot tables.
42.3 MS Excel | Example Home / Domestic Finance Tracker with charts for all domestic outgoings (3)

Screenshot 68:

A spreadsheet for tracking home finances and outgoings with charts and pivot tables.
42.4 MS Excel | Example Home / Domestic Finance Tracker with charts for all domestic outgoings (4)

Screenshot 69:

A spreadsheet for tracking home finances and outgoings with charts and pivot tables.
50.1 Appendices

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