

Top Templates for Managing a Project Team

Team FME



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Helen Bristoll

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Introduction

The role of a project manager has become more complex and the breadth of skills an individual must have to succeed has expanded considerably. You can no longer just be a subject expert you must have a working knowledge of key management skills.

Being able to adapt generic templates to suit the needs of your specific project is an essential part of any project managers '*tool kit*'. These templates offer you the following benefits:

- Save you time because you are not starting with a blank sheet. This ensures that you are productive and efficient.
- Easy to modify and adapt to suit the exact needs of your project.
- Provide a simple checking mechanism when writing the functional area management plans for your project. This ensures that you don't forget anything vital.

Project managers must have excellent written and verbal [communications](#) so they can express themselves competently when discussing:

- [Financial](#) principles and statements
- [Strategy](#) and planning
- [Project Management](#)
- [Leadership](#) and [productivity](#)
- [Sales](#) and [marketing](#)

Being able to express your decisions and requirements in the language of each discipline above has become a basic requirement of any manager.

Knowledge in the form of market intelligence is the life-blood of organizations and managers are constantly asked to supply such data to aid in the analysis of the internal capabilities of an organization.



Our FREE management resources will help you acquire the level of such skills needed to perform your role effectively.

Whether you need the detail of an eBook, the guidance of a checklist or template to help you perform and manage a specific task <http://www.free-management-ebooks.com> website has a free resource you can download onto your PC, Mac, laptop, tablet, Kindle eBook reader, iPhone or Smartphone.

Top Templates for Managing a Project Team

The following templates are the most popular downloads requested on our website and each one will help you to perform your role more efficiently.

Human Resources Management Plan

Team Satisfaction

Performance Data Gathering

360⁰ Performance Evaluation

Communication Management Plan

Assessment of Stakeholder Interest

Stakeholder Register

Stakeholder Management Plan

You no longer have to create your own template or wonder if you've thought of everything you need to do to perform a task the knowledge you need is at your fingertips.

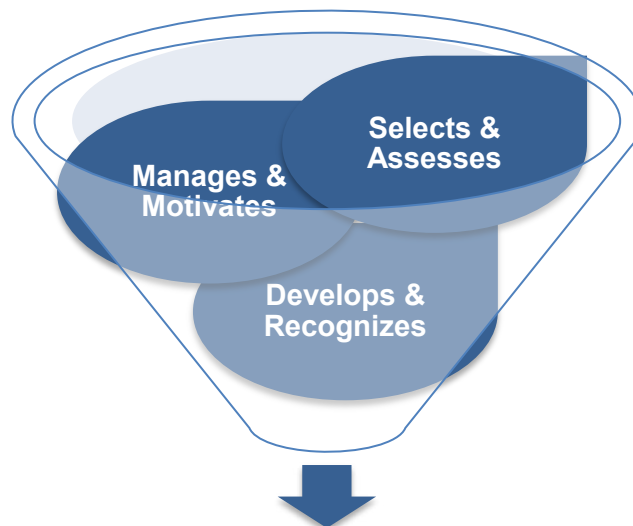
1. [Human Resources \(HR\) Management Plan](#)
2. [Team Satisfaction](#)
3. [Performance Data Gathering](#)
4. [360⁰ Performance Evaluation](#)
5. [Communications Management Plan](#)
6. [Assessment of Stakeholder Interest](#)
7. [Stakeholder Register](#)
8. [Stakeholder Management Plan](#)

Before each template there is a description of how it will aid your performance and some background information to clarify its purpose if you are using it for the first time.

Human Resources Management Plan Template

This [Human Resources \(HR\) Management Plan](#) is the essential document you will use to manage your project team to a successful completion. This template has been designed to help you develop a thorough and practical HR management plan for your project. It is within this management plan that you present your approach to developing the team members sufficiently so that the project can be completed on time and to budget.

As project manager you define and describe in this plan the roles and responsibilities of each person in the team for the project. It describes how the personnel involved in this project will be selected, managed, assessed and developed to ensure the team has all the skills and expertise required for its success.



HR Management Plan defines how Project Manager will build his/her *'project team'*

This plan is closely linked to three other key project plans those of time, cost and scope management. The details of your HR management plan and the interactions with other project management plans are the building blocks for successfully managing the inevitable changes a project will undergo.

Once this plan has been developed, as project manager you then have to acquire and develop the project team itself. Once you have your team

you have to manage that team throughout the duration of your project. This commonly takes place in a matrix management environment that recognizes the specific needs of managing people who have two managers.

The HR plan's main purpose is to detail how members of the project team will be managed, assessed and 'rewarded' for the part they play in the project. For individuals the rewards should be on two levels.

1. Firstly, organizational - receiving recognition in their annual appraisal for the contribution to the project.
2. Secondly, personally - with the development of their skills and competencies.



It defines each of the project roles, the skills needed, outlines areas of responsibility and their contribution to the project reporting requirements. This is usually represented in a project organizational chart. A consistent and constant supply of the key personnel especially those with a highly valued skills set is a continual issue for any project manager.

Management of the project team is a continual balancing act and the HR plan gives you the opportunity to highlight potential issues, such as scarce resources, before the project starts. The sign-off of this plan ensures agreement has been made on how best to manage these scarce resources within the organization to minimize conflict.

One of the most popular tools is RAM (Responsibility Assignment Matrix) because it shows the connections between team members or groups and the work packages or activities as defined by the work breakdown structure (WBS). This method guarantees that a single person is accountable per task ensuring clarity and responsibility. The diagram below shows the most popular tools used in this process.



Excellent communication skills and leadership skills are crucial for a project manager when managing his or her team. The project manager's role is to ensure success is attained with the people he or she has at their disposal. Establishing firm and clear ground rules is vital to any project and its importance increases when managing a project over multiple sites.

Download your own copy of the [HR Management Plan](#) template.

Team Satisfaction Template

Any project manager needs to know the 'mood' of his or her team and the [Team Satisfaction](#) template enables you to rate the level of satisfaction for each team member.

It comes as no surprise that the most successful project managers are those who are best at relating to their team. Making sure that they each feel valued, appreciated, and positive. Failure to do this can lead to problems of poor communication and conflict. Knowing how your team members feel about the project, their work, as well as whether their relationship with their job is a love, hate, or apathetic one, will play a significant part in how they perform.

Being aware of the feeling within the project team lets you know whether you should adjust how you interact with them and if you need to you ask for more information in their regular reports. One of the best ways to attain such intelligence is through networking throughout the project team members and stakeholders.

You need to foster a team environment that allows individuals to offer their input and feedback without fear of retribution or blame. Make the time to listen to their frustrations, and remember that you need to try to see things from their perspective. Aim to create maintain a team atmosphere that engenders openness and you will find a motivated and committed project team.

Download your own copy of the [Team Satisfaction](#) template.

Performance Data Gathering Checklist

One of the most effective ways for a project manager to engender an efficient project team is to understand who is performing well and who may need more direction. The way to achieve this is to track and record each team member's performance and his [Performance Data Gathering](#) checklist will help you achieve this without the exercise becoming a burden.

Gathering performance data is an essential part of the assessment process. This data should be collected from several sources in order to provide a balanced picture of the team member's performance. You should collect data based on the individual's project role and how well he or she is progressing towards their targets, third party feedback, and observed competencies, as well as generic data, like attendance and general reliability.

A popular tool project managers use is the 360⁰ feedback exercise because it enables other team members, subordinates, peers and third parties to express their views of that person's performance. It is especially useful because it includes a self-evaluation by the individual, offering you a well-rounded view of each member's performance to the project team.

Most organizations have developed their own competency framework that details the competencies expected of someone operating at each particular level within it. Some are seen as 'core' competencies required by everyone within the organization, whereas others are specific to the project. You will attain such performance data by observing the behaviors they display especially in significant incidents that involved that person.

Download your own copy of the [Performance Data Gathering](#) template.

360⁰ Performance Evaluation Template

The [360⁰ Performance Evaluation](#) template provides you a set of questions that are asked of each project team member and the individual to assess their level of performance. This is an extremely useful tool to find out how each member's contribution and performance is perceived.

360⁰ feedback should be solicited from a team members immediate work circle including subordinates, peers, and supervisors. It can also include feedback from external sources, such as suppliers and customers or other interested parties.

Research suggests that this type of feedback tends to assign lower ratings to specific skills than team members would assign to themselves in a self-rating exercise. There is also evidence to suggest that people who have known the team member for longer give the most accurate assessments.

If appropriate you could include the project sponsor and key project stakeholders in this performance gathering process. As feedback from such individuals will enable team members to see how their actions have been interpreted outside the nucleus of the project team and enable them to perform more effectively.

Many organizations have their own policy with regard to conducting a 360⁰ feedback and a project manger should always check that this sort of performance appraisal tool is acceptable before undertaking this type of exercise.

Download your own copy of the [360⁰ Performance Evaluation](#) template.

Communications Management Plan Template

A fundamental skill of any project manager is his or her ability to communicate clearly and concisely to anyone connected with the project. This is why the [Communications Management Plan](#) plays such a vital role in a project's success.

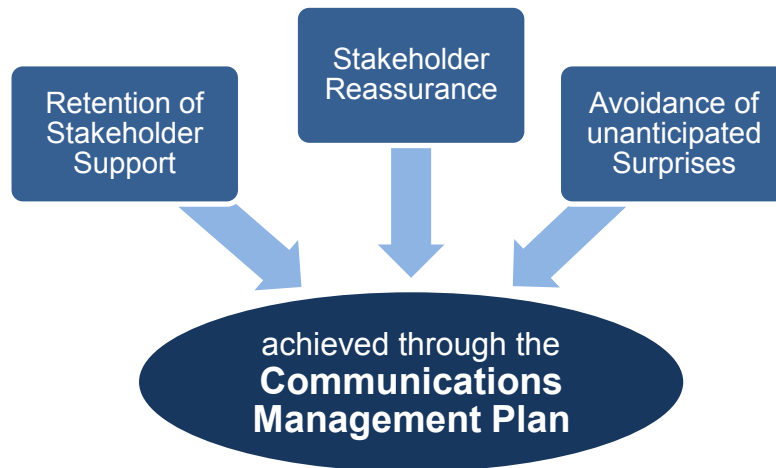
This plan's template ensures all formal communications with the project stakeholders are managed properly. Knowing the nature of a stakeholder's interest in your project enables you to plan the depth and frequency of communication with that person throughout the project.



The answers to these four questions will tell you as project manager the most effective way to handle the wide variety of working relationships that make up your project. It is your sole responsibility to manage project communications effectively. This means:

- Getting the right information to people at the right time to perform their role.

- Everyone should only receive relevant information.
- A pre-defined escalation process identifies issues / problems at the lowest levels.
- Creating an infrastructure for generating, collecting, distributing and storing all project communications



For the project manager all project communications must offer reassurance and retain commitment throughout its lifecycle. It is important to avoid situations where stakeholders hear something about the project that leads them to make incorrect assumptions that lead to conflict. Communicating in a well-structured and informative manner allow issues to be resolved before they become show stoppers, keeps all parties focused on and motivated to attain the project objective.

Download your own copy of the [Communications Management Plan](#) template.

Assessment of Stakeholder Interest Template

This [Assessment of Stakeholder Interest](#) template enables you to assess who your project stakeholders are and why they want / need to be involved in your project. Using this intelligence you decide the most appropriate level of participation each stakeholder has in the overall project based on this role.

This process also enables you to draw attention to any barriers, issues, or problems that are present between stakeholders. As with all areas of project management the more useful data you have gathered as part of your initial planning the more effectively you will be able to monitor and manage the project itself.

A significant aspect of this intelligence enables you to appreciate the expectations and motivations of its key supporters and stakeholders. With this knowledge you can formulate how best to set and manage each of these individuals' expectations. As project manager it is your responsibility to educate them on what is realistic to expect from the project.



Building up a sound working relationship with your stakeholders takes time and is achieved through the information you pass to them and demonstrating your understanding and empathy. This template has been designed so that you gather as much information as you can to give you a thorough understanding of the motivations of your stakeholders. It helps you

evaluate who needs to be involved in your project and identify those who do not have a real interest.

Once you have all this data you will meet with your project sponsor to decide who is essential to the project's success. Together you agree an appropriate level of participation of each stakeholder and define his or her role in the project at each phase.

During your research any issues, problems or barrier that may exist between stakeholders will be discovered. In some instances you may need to re-assess a particular stakeholder's role and level of participation. Due to an individual's role in an organization you may have to retain them as a stakeholder despite seeing that they will cause problems. Such findings will be incorporated in the Stakeholder Management plan and the Communications Management plan so that any disruption is minimized.

Our template's tabular format enables you to have a visual representation of how stakeholders' interests and benefits in the project match or conflict with each other. This allows you to group stakeholders in a logical way for communications. You can also begin to identify potential roles they could perform in the project and match these to the attributes and expertise they bring to the project. This will also help you to identify potential issues and assess the risk to the project these could pose and how you could counteract them to ensure the project's success.

Download your own copy of the [Assessment of Stakeholder Interest](#) template.

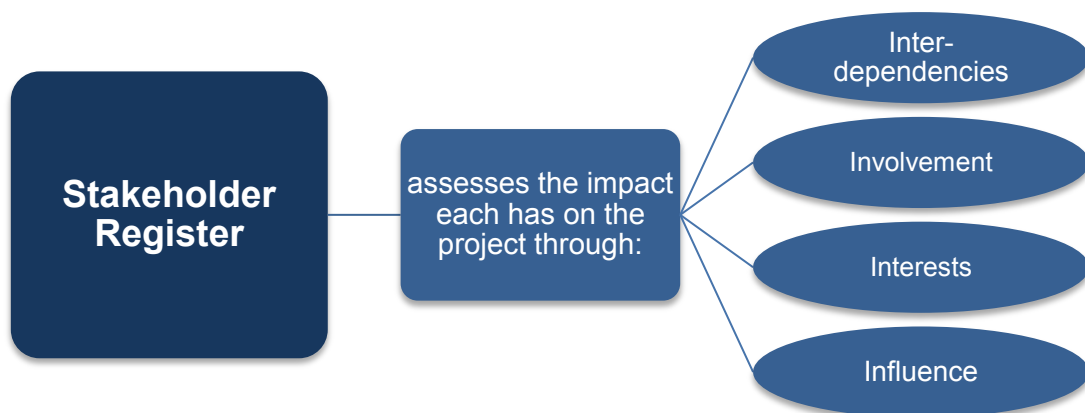
Stakeholder Register Template

The management of a project's stakeholders is a significant part of managing the project team. This [Stakeholder Register](#) template helps you document all the information needed to establish and manage a good working relationship with each one. A common definition for a stakeholder is:

Any individual that has an interest in the project. It does not matter whether this interest is of a positive or negative nature.

Their role and your understanding of their wants and hopes are key to your project success.

Your first action is to assign a category to each stakeholder based on his or her level of interest, influence and involvement in your project. This documents what they want from the project and their expectations of what will happen on completion as it relates to his or her role and organization.



Your ability to communicate in an appropriate manner with each one is critical to retaining their support and backing as you manage the project team. The category you give each stakeholder will determine this level and content of communication. Some will be actively involved in the project others are affected by the implementation of or on its completion.

This register ensures you and your sponsor understand how much influence each stakeholder can wield during the project and what their level of project engagement. It will be one of the project management plans key inputs. The

sensitive nature of the information this register contains means that it must be highly selective as to who has access to, especially as it alters as the project progresses. Often only the sponsor, project manager and one, or two, trusted project staff will be privy to its contents.

It is one of the most important contributory documents used when putting together the stakeholder management plan. It ascertains what and when a stakeholder will receive project communications. Its importance impacts other project areas and its overall success.

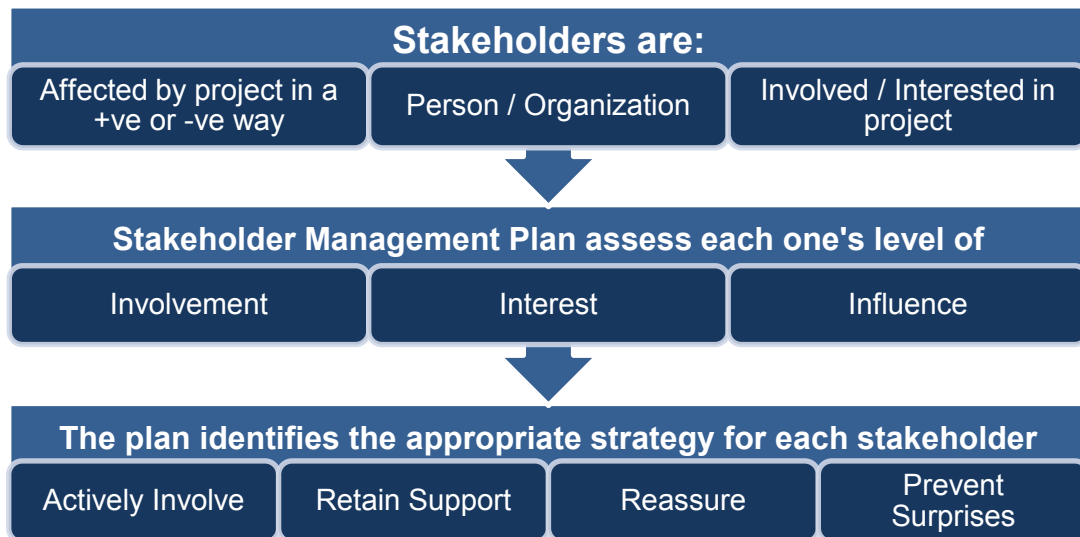


The knowledge of stakeholders has a key role to play in defining a projects scope, managing its quality, identifying potential risks and in ensuring the necessary resources are procured. Their expert knowledge may be invaluable when selecting third parties to incorporate into the project team.

Download your own copy of the [Stakeholder Register](#) template.

Stakeholder Management Plan Template

This [Stakeholder Management Plan](#) is one of the critical documents you need to be able to properly manage your project team. This template provides you with a structured means to record all essential data and information you need to identify and categorize project stakeholders.

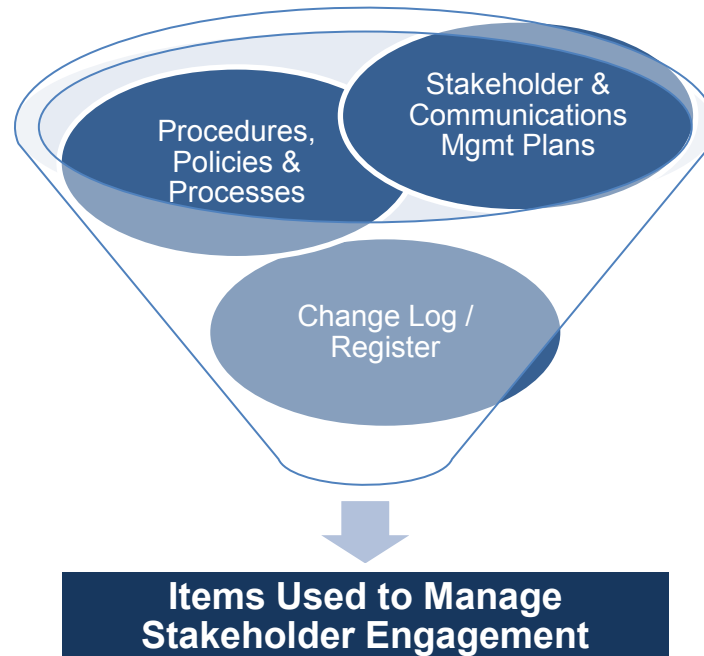


The level of 'interest' for a stakeholder is assessed by how much influence, involvement and interest in the projects outcome that individual person or organization has. Having established this you can then develop a strategy for communicating and managing each one. This ensures your interactions with each stakeholder match their level of interest and influence over your project.

This management plan ensures that stakeholder involvement is based upon the individual's awareness of their responsibilities, and where communication between them is clear and comprehensive. Stakeholder-based contributions to project success include executive support and effective use of the organization's infrastructure to support the project.

The purpose of the stakeholder management plan is to ensure stakeholder remains engaged with the project and defines the extent of that involvement. Managing this particular group of your project team means that you have to address issues that affect their interest in an expedient way and

that the project continues to meet the stakeholder's needs. As such there is a very close link to the project communications management plan that defines the nature of each communication as shown in the diagram below.



Projects exist in an interactive environment that is impacted by external forces that it can do its best to anticipate but inevitably some issues are difficult to predict and as such changes need to be considered and made in order for the project to meet its end user requirements. That is why stakeholders need to be kept informed of additions to the change log or register as they occur so that they can assess its impact on their own interests and feedback their thoughts as part of the decision making process.

Good management of stakeholder's interests from the outset will help you to avoid unnecessary diversions that arise from a lack of understanding of their needs and interests.

Download your own copy of the [Stakeholder Management Plan](#) template.

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