

## **Project Management Workbook**

The Project Management Workbook has been designed for project managers and project teams. Project management activities essential to the project management process are captured in this workbook. Additional activities such as Status Reports and the Work Breakdown Structure may be added to this workbook or tracked elsewhere. Individual worksheets are hyperlinked below to facilitate navigation. For instructions to use the PM Workbook, please refer to the PM Workbook Procedure.

[I. Status Meeting Agenda & Minutes](#)

[II. Risk Matrix](#)

[III. Issue Matrix](#)

[IV. Corrective Action Items](#)

[V. Attendee & Contact List](#)

**Status Meeting Agenda and Minutes**

TO #: Project Name

Planned Go Live Date: MM/DD/YY

Date:	MM/DD/YY
Time:	9:30 AM
Location:	Rm 300
Session # <X>:	Kick-off session

Desired Outcomes of Meeting
1
2
3

#	Topic	Responsibility	Time	Meeting Minutes	Action Taken
1	Assign Scribe, Time Keeper, Focus Keeper	Facilitator			Scribe: Time Keeper: Focus Keeper:
2	Review Agenda Items	Facilitator			
3	Open Action Items				
4	Individual Status Reports				
5	Overall Progress				
6	Effort/ Performance				
7	Cost/Budget				
8	Milestones/ Schedule				
9	Deliverable Status				
10	Risks				
11	Issues				
12	New Action Items				
13	Additional				

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**Risk Matrix**  
 TO #: Project Name  
 Planned Go Live Date: MM/DD/YY

No.	Description of Risk	Risk Category	Level of Impact	Probability of Occurrence	Priority	Mitigation Strategy / Response	Target Completion Date	Jeopardy Date	Team Assigned	Risk Status
1							MM/DD/YY	MM/DD/YY		
2										
3										
4										
5										
6										
7										
8										
9										
10										

\* Header can only be changed in the Status Meeting Agenda & Minutes worksheet.

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**Issue Matrix**  
 TO #: Project Name  
 Planned Go Live Date: MM/DD/YY

No.	Description of Issue	Date Identified	Updates from Status Meetings	Priority	Resolution Approach	Constraints to Approach	CM Action Required	Bus. Case / SAP Updates	Target Resolution Date	Issue Owner	Issue Status
1		MM-DD-YY					Yes / No	Yes / No	MM-DD-YY		Status: O, MM-DD-YY
2											
3											
4											
5											
6											
7											
8											
9											
10											

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**Corrective Action Items List**

TO #: Project Name

Planned Go Live Date: MM/DD/YY

<b>Date Identified</b>	<b>Action Item</b>	<b>Due Date</b>	<b>Date Resolved</b>	<b>Comments</b>	<b>Responsibility</b>	<b>Category</b>
MM/DD/YY		MM/DD/YY	MM/DD/YY			

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