Useful Templates for Businesses

Australian Centre for Education & Training

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- **Mr. Josh Stevens (primary contributor)**

Useful Templates for Business

Accounting and Finance Templates

- Smartsheet.com 2016, '*Top Excel Templates for Accounting*', viewed 14 December 2016, <**https://www.smartsheet.com/top-excel-accounting-templates** >.

Managing financial records is vital to successfully running a business and making informed business decisions. This site offers a range of Microsoft Excel accounting/financial templates for free download, along with a description of when to use each, allowing businesses to track their capital inflow and outflow. For example, the billing statement provides a template to forward to customers if payments are owing, whilst the cash flow forecast helps businesses to check if their spending is on track, or highlight where money is being lost.

Workforce Planning and Human Resources Templates

- State Government of Victoria 2016, '*Workforce planning and HR templates*', viewed 14 December 2016, <http://www.business.vic.gov.au/hiring-and-managing-staff/staff-recruitment/workforce-planning-and-HR-templates >.

This webpage helps businesses assess their staffing needs and better plan their workforce. Templates include a workforce information template to help keep track of staff, a workforce action plan to help determine future staffing needs, and an HR manual template to help ensure staff fit the workplace plan and adhere to the business' policies and procedures.

<u>Project Management and Communication Templates</u>

Project Initiation:

- Piscopo, M. 2015, '*Project Charter (Single Page Version)*', viewed 14 December 2016, <http://www.projectmanagementdocs.com/project-initiation-templates/project-charter.html#axzz4NyIO5afD >.

For the project initiation stage, this link offers a concise, one-page project charter. By covering the scope of the project, giving the Project Manager authority over the project, listing summary milestones, stating the project budget and identifying funding sources, this template helps businesses to map out the fundamental aspects of a project.

Stakeholder Management:

- Piscopo, M. 2015, '*Stakeholder Management Strategy*', viewed 14 December 2016, **<http://www.projectmanagementdocs.com/project-initiation-templates/stakeholder-management-strategy.html#axzz4NyIO5afD** >.

This link provides a stakeholder management strategy to assist businesses to effectively highlight their key interest groups and the significance of these entities to the project at hand. By identifying stakeholders and their impact on the project, and documenting the necessary stakeholder management strategies, the template helps businesses to increase support and decrease the negative impacts of stakeholders on the project.

Project Planning:

- Piscopo, M. 2015, '*Work Breakdown Structure (WBS)*', viewed 14 December 2016, **<http://www.projectmanagementdocs.com/project-planning-templates/work-breakdown-structure-wbs.html#axzz4NyIO5afD** >.

This link offers a work breakdown structure (WBS) to assist businesses in planning and executing a project by giving a structural overview of work that needs to be done. The template provided can be used to give direction to a project, by defining the work required for the project and developing the project schedule.

Cost Management:

- Parkland College 2016, '*Cost Management Plan*', viewed 14 December 2016, **<http://www2.parkland.edu/businesstraining/documents/CostMgmtPlan.pdf** >.

To help businesses map out where resources will be spent, this template provides a cost management plan for projects. The template includes sections on the purpose of the plan, major project costs, potential causes of increases in cost or effort, and project control procedures.

Communications Management:

- State Government of Victoria – Department of Education and Training 2016, '*Communications Strategy Template*', viewed 14 December 2016, **<http://www.education.vic.gov.au/Documents/school/principals/community/commstrategytemplate.pdf** >.

This link offers a communications strategy template to help plan how partnerships and communications with stakeholders can be managed. Originally designed for partnerships in schools, this template can be easily altered to suit most businesses. The sections included in this template help to determine the goals and objectives for the partnership or project, key messages, target audiences for the message, any risks or issues that may arise, and the communications budget, allowing communications to be planned and implemented accordingly.

Project Execution:

- Tidy Forms 2016, '*Executive Status Report Template*', viewed 14 December 2016, <**https://www.tidyforms.com/download/executive-status-report-template.html** >.

To help businesses keep track of a project and determine which tasks have been completed, this link provides an executive status report template. It includes an executive milestone review, project status summary, project milestone status review, planned accomplishments summary, project issues summary, project risk summary, and a section for executive assistance requests.

Project Monitoring and Control:

- Shire of Northam 2016, '*Sample Risk Management Plan*', viewed 14 December 2016, <**http://www.northam.wa.gov.au/Assets/Documents/Document-Centre/environmental-health/Events/SAMPLE_RISK_MANAGEMENT_PLAN.pdf** >.

This link offers a sample risk management plan, essential to help businesses identify and manage different risks. Originally designed for managing risks at public events, this template can be easily altered to suit most situations and businesses. This template has sections to help identify and assess risks on the basis of their severity and likelihood, evaluate and treat potential risks, and develop a risk action plan to manage each risk.

- Arnecke, M. 2016, '*Project Time Management Templates*', viewed 14 December 2016, <**http://project-management.magt.biz/templates/03-time-mgmt/index.php**> **(select *Project Schedule Management Plan*)**.

The project schedule management plan provided at this link assists businesses to effectively manage their time, allowing the tasks required for a project or program to be completed in a timely manner. This template covers the schedule management process and activities, milestone and activity lists, and monitoring and controlling the schedule, with sections on sequencing, resource and duration estimation, schedule updates and changes, and reporting.

Project Completion:

- USA.gov - Centers for Disease Control and Prevention 2016, '*Templates*', viewed 14 December 2016, <**https://www2a.cdc.gov/cdcup/library/templates/default.htm**> **(select *Project Completion (Close-Out/Archive)*)**.

This template offers a project close-out form to allow businesses to tie up the completion of a project, ensuring everything is correctly documented and nothing has been overlooked before the project is officially finished. The template covers general project information, management effectiveness, lessons learned, administrative closure, contract closure, information distribution, and project close-out approval.