

HVAC Project Management Template

Project Overview

Project Name: _____

Project Manager: _____

Client Name: _____

Project Start Date: _____

Expected Completion Date: _____

Project Goals:

Scope of Work:

Installation

Maintenance

Repair

Project Deliverables

Team and Stakeholders

Project Team Members: _____

HVAC Technicians: _____

Support Staff: _____

Client Contact Information: _____

Key Stakeholders: _____

Project Plan

Work Breakdown Structure (WBS):

List all major activities and break them down into smaller tasks.

Schedule:

Create a timeline for each task and activity.

Budget:

Estimate costs for labor, materials, equipment, and any subcontracted work.

Resource Allocation:

Assign team members to tasks based on skills and availability.

Risk Management Plan:

Identify potential risks and develop strategies to mitigate them.

Execution Plan

Communication Plan:

Define how project information will be communicated to the team, stakeholders, and the client:

Quality Control Procedures:

Outline standards and procedures for ensuring the quality of work:

Safety Protocols:

Establish safety guidelines to protect workers and property:

Monitoring and Control

Progress Tracking:

- Methods for monitoring project milestones and task completion.

Budget Management:

- Track expenses and compare them to the budgeted amounts.

Change Management:

- Process for managing changes to the project scope or plan.

Closing

Client Handover:

- Procedures for transferring control of the completed project to the client.

Documentation:

- Collect and organize all project documents for future reference.

Project Review:

- Conduct a meeting to discuss what went well and what could be improved.

Feedback Collection:

- Gather feedback from the client and team members.

Appendices

Appendix A: Project Documents

Contracts, permits, plans, and any other relevant documents.

Appendix B: Meeting Minutes

Appendix C: Change Requests and Approvals

Appendix D: Inspection and Testing Reports