Project Plan Guidelines

*How to structure a successful plan*

# 1. Project Background

Briefly describe the purpose of the project, the problem it solves, and its expected impact.

# 2. Project Objectives

*Define clear, measurable goals with timelines.  
Example: Retain 80% of our 2M active customers over Q4 2025*

# 3. Scope of Work

## *This defines what needs to be completed to move toward your goals.*

## In Scope

What the project will deliver.

## Out of scope

What’s excluded.

# 4. Deliverables

List the tangible outcomes (reports, campaigns, dashboards, features, etc.).

# 5. Stakeholders

Identify key team members, their roles, and level of involvement.

# 6. Timeline and Milestones

Outline project phases: Initiation → Planning → Execution → Monitoring → Closure

# 7. Budget Overview

State budget allocation and which areas will use it.

# 8. Risk & Mitigations

Highlight key risks and how they will be managed.  
*Example: Risk of delay → Weekly check-ins*

9. Assumptions & Dependencies

*Clarify assumptions (e.g., resources available) and dependencies (e.g., vendor readiness).*

10. Communication Plan

*Define how updates will be shared (frequency, channel, owner).  
Example: Weekly status email + monthly stakeholder meeting.*

11. Monitoring & Evaluation

*Success criteria and KPIs (e.g., cost efficiency, customer retention, LTV).*

# 12. Next Steps and Continuous Improvement

*Outline actions after project delivery and areas to monitor for ongoing improvement.*