

**Project Plan**

***[Project Name]***

***Date***

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***Information contained in table is for illustration purposes***

*Instructions are in blue italics. Delete all instructions (including this text) once the document is complete.*

**Project Information**

|  |  |
| --- | --- |
| **Project Name** |  |
| **Project Number** |  |
| **Project Manager** |  |
| **Sponsor** |  |
| **Client** |  |
| **Start Date** |  |
| **End Date** |  |

**Purpose**

*Use this section to state the purpose of your project.*

**Scope Management**

**Scope Statement**

*Provide a scope statement, including what is within and what is not within scope; that is, the scope of the project needed to meet the stated objective. It is important to keep in mind that scope includes the requirements for both the product scope (the features and functions of a product or service) and project scope (the work required to deliver the product).*

|  |  |
| --- | --- |
| **In Scope** | **Out of scope** |
|  |  |
|  |  |
|  |  |

*Project Managers are responsible for managing and controlling the scope of the project.*

When the Project Plan is approved project scope is base-lined. A significant variance in scope (determined by the judgement of the project manager) will trigger the project change management process.

**Outcomes**

*With the help of the business, define the outcomes the business will achieve as a result of this project. Outcomes can be top line (e.g. increase revenue), bottom line (e.g. reduce costs), cost avoidance (e.g. reduce errors), productivity (e.g. streamline processes), compliance (e.g. project mandated by legislation).*

**Objectives**

*The main objectives of this project stated in terms that clearly support the outcomes.*

**Deliverables**

**Project Deliverables**

*List the major items to be delivered to the clients or other parties. As appropriate, list the deliverables, a description, and who reviews, is informed and approves. A table like the one below is a good way to show this information.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Project Deliverable** | **Description** | **Review** | **Informed** | **Approval** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Project Management Deliverables**

*The list should list the project management deliverables (e.g. project schedule, communication plan, progress report, etc.)*

|  |  |  |  |
| --- | --- | --- | --- |
| **PM Deliverable** | **Review** | **Informed** | **Approval** |
| Project Initiation Document |  |  |  |
| Project Plan |  |  |  |
| Project Schedule |  |  |  |
|  |  |  |  |
| Project Completion Statement |  |  |  |

**Constraints**

*Constraints or restrictions limit or place conditions on the project, especially those associated with the project scope (e.g. a hard deadline, a predetermined budget, a set milestone, contract provisions, privacy or security considerations, etc.).*

**Assumptions**

*Assumptions are factors that for planning purposes are considered to be true, real or certain. If necessary, schedule work to confirm critical assumptions.*

**Stakeholders**

*Identify the individuals or organizations (e.g. client, sponsor, performing organization or the public) that are actively involved in the project, or whose interests may be positively or negatively affected by execution or completion of the project.*

**Schedule Management**

**Milestones**

*Identify the significant milestones in the project (phases, stages, decision gates, approval of a deliverable, etc.). This can also represent the high-level project schedule.*

|  |  |
| --- | --- |
| **Milestone** | **End Date** |
| Project Start | Click here to enter a date. |
|  | Click here to enter a date. |
|  | Click here to enter a date. |
| Project Delivery – final client deliverable accepted, project in closeout phase. | Click here to enter a date. |
| Completion – Project Completion Statement approved by sponsor. | Click here to enter a date. |

**Project Schedule**

*A project schedule in the form of a Gantt chart can be created.*

**Resource Management**

*How much effort is needed by whom over the duration of the project?*

*Project managers, please insert the correct month in the table headings.*

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Function/Role** | **Person** | **M1** | **M2** | **M3** | **M4** | **M5** | **M6** | **M7** | **M8** | **M9** | **M10** | **M11** | **M12** | **Total** |
| Project Management | Joe | 20 | 20 | 20 | 10 |  |  |  |  |  |  |  |  | 70 |
| Business Analysis | Jane | 5 | 40 | 40 | 0 |  |  |  |  |  |  |  |  | 85 |
| Development | Steve | 0 | 50 | 50 | 10 |  |  |  |  |  |  |  |  | 110 |
| Subject Matter Experts | Sam | 30 | 30 | 30 | 30 |  |  |  |  |  |  |  |  | 120 |
| Solution Design | Jill | 0 | 15 | 0 | 0 |  |  |  |  |  |  |  |  | 15 |
| Totals |  | 55 | 155 | 140 | 50 |  |  |  |  |  |  |  |  | 400 |

**Project Governance**

*Using a diagram, illustrate the governance bodies that may be involved in the approval process and describe their roles and responsibilities.*



**Roles and Responsibilities**

*Add/remove roles, edit responsibilities, add names. Add rows as needed.*

|  |  |  |
| --- | --- | --- |
| **Role** | **Responsibility** | **Name(s)** |
| Steering Committee | Review project plan.  Provide project oversight.  Escalation point for project issues.  Approve Deliverables |  |
| Sponsor | Identify business requirements and desired outcomes.  Review and approve solution developed by the project team.  Review and approve all project deliverables.  Provide resources needed for the success of the project as agreed upon and outlined in Resource Management section of this plan. |  |
| Project Manager | Responsible for the success of the project.  Create Project Management deliverables for approval by the Business Sponsor and Project Review Committee.  Follow the Project Plan; submit Change Requests if the plan changes.  Provide regular Status Updates.  Communicate to all stakeholders.  Assign rolls and tasks to Project Team Members.  Ensure that issues and risks to the project are appropriately resolved or escalated. |  |
| Team Leaders | Lead team  Coordinate work  Work with project manager to report on progress |  |
| Subject Matter Experts, Technical Team | Successful completion of tasks assigned by the Project Manager.  Report issues and risks to the Project Manager.  Support the overall success of the project.  Participate in UAT and provide feedback.  Adhere to a testing schedule that is agreed upon and is conducive to meeting the project milestones. |  |

**Change Management**

*Change is an addition, modification or removal to a previously agreed to output or deliverable. Any circumstance that affects scope, cost, schedule, or disposition of the project (i.e. cancellation, hold) constitutes a change. Use tis section to describe how you plan to manage change in your project.*

**Risk Management**

*Use this section to describe how you will manage risk during the project. Risk Register can be embed here. A risk register template is available from the PMRC site.*

**Issue Management**

*Use this section to desciube how issues will be handled. Issue log can be embed in here. An issue log template is available from the PMRC site.*

**Communication Management**

*Describe how communications will be managed throughout the Delivery Stage of this project. This should include processes that will be used to plan communications, identify and manage stakeholders, determine communication requirements, roles and responsibilities, tools and techniques.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Stakeholder** | **How will they impact the project** | **How will they be impacted by the project** | **Communication Requirements** |
|  |  |  |  |
|  |  |  |  |

The Communication Table is an overview of the project’s external and internal communications.

*Add/remove rows as needed. Adjust the frequency as appropriate for the project.*

*A Communication Plan template is available from the PMRC site, if desired.*

|  |  |
| --- | --- |
| **Communication** | **Frequency** |
| Project Kick Off Announcement | Project start |
| Status Report | Bi-weekly |
| Dashboard Updated | Dashboard will always reflect most recent Status Report |
| Client Status Meeting | Weekly |
| Steering Committee | Monthly |
| User Acceptance Meeting | Weekly |
| Project Close Down Announcement | Project delivery |

**Project Approval**

This plan is approved by the below individuals.

*Physical signature is not required. Email approval can be used. If used Insert the approval email (s) in the ‘signature/Approval Email(s)’ column below:*

|  |  |  |
| --- | --- | --- |
| **Role** | **Name** | **Signature/ Approval Email (s)** |
| Project Manager |  |  |
| Sponsor |  |  |