**PROJECT MANAGEMENT PLAN**

**[Client name]**

**[Project name]**

**Note:**

1. **Replace all red text** while editing the template for your project.

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# DOCUMENT CONTROL

## DOCUMENT REVISION HISTORY

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Author** | **Change Description** |
| 0.1 |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## DOCUMENT REFERENCES

|  |  |
| --- | --- |
| **Reference** | **Referenced item** |
|  | **[insert document references such as the signed contract, any client provided documents such as travel policy, etc.)** |
|  |  |

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# EXECUTIVE SUMMARY

**This section is brief and to the point.**

## SCOPE SUMMARY

**Provide a brief summary of the contract statement of work. Include a list of deliverables**

## [CLIENT] GOALS/OBJECTIVES

**Include any details learned from the Client prep** **call, specifically client goals and objects that align with the scope of the contract. Use Client terms when possible.**

## PERIOD OF PERFORMANCE

**Contract length, start date and number of hours to be worked by the Consultant**

## PROJECT MILESTONES

The proposed milestone is to identify key deliverables, specific to the work Red Hat will deliver. The timeline is determined by the statement of work, work identified below is planned to be completed within the duration of the contract. As the project progresses, the schedule is subject to change based on project activities.

Note: The milestone schedule below is the initial plan and may be adjusted as the team progresses.

**[insert your milestone list and estimated completion dates]**

**It is recommended to provide a project schedule showing more details at the task level when possible. Include any external dependencies in the schedule.**

# ROLES AND RESPONSIBILITIES

1. **Include the names, phone numbers, and email addresses under the Client and Red Hat headings.**
2. **Time commitment column helps communicate amount of time to dedicate to the project. For example, the Sponsor spend 1 hour a week attending the status call and another hour answer ad-hoc questions.**
3. **Adjust the role & responsibility columns as needed to fit the scope of work.**

|  |  |  |  |
| --- | --- | --- | --- |
| **GROUP** | **ROLE** | **RESPONSIBILITY** |  |
| **A** | **Sponsor**  Champions the initiative and is ultimately accountable for its success and benefit realization | * Makes business decisions and provides direction to team. * Confirming buy-in of the project/initiative at management levels * Keep project manager and team abreast of corporate strategies, other initiatives or changes that may impact the project team * Clarifies and interprets relevant business policies and guidelines * Identifies project stakeholders/vested interests * Removes barriers to team progress, problem-solving, resource and cross-functional issues * Maintains current knowledge of the project (project manager briefings, attends status meetings) * Authorizes project spending/overspending based upon approved funding limits * Authority to terminate (direction/cost) * Provides regular feedback to team on performance versus expectations * Participates in post-implementation review and ensures end results match original goal | **Client** |
| [Name, Contact phone, Email] |
| **Red Hat** |
| [Name, Contact phone, Email] |
| **Expected Time Commitment** |
| [Example: 1 hour/weekly] |
| **B** | **Project Manager**  Owns the project and is accountable for the overall success of the project as measured by meeting scope, schedule and budget objectives | * Develops Project documents and high-level project plan * Defines resource requirements, establishes project organization structure and manages project team * Negotiates with line managers for resources * Creates detailed plan for the team (based upon agreed time estimates), assign tasks and tracks progress against plan * Manages scope, change process, updates Project documents, and project plan as necessary * Communicates regularly to Sponsor, line managers, 3rd party, and other stakeholders of Project status and expectations * Provides regular feedback to delivery team members on performance versus expectation * Manages issues and resolves conflicts * Anticipates problems and takes or recommends corrective action; escalates issues and problems as necessary to sponsor * Gives stakeholders/vested interests a voice throughout the project * Maintain sustained buy-in at all levels to project scope and its deliverables | **Client** |
| [Name, Contact phone, Email] |
| **Red Hat** |
| [Name, Contact phone, Email] |
| **Expected Time Commitment** |
| [Example: 1 hour/weekly] |
| **C** | **Business or Technology Line Manager**  Decision Maker for final goals and approach of Project. Owns customer staffing for Project, logistics for completion and financial responsibilities. | * Supports project managers in the achievement of the project goals * Accountable for commitment to timeliness and quality of the deliverables from their area as negotiated with the Project Manager and documented in the project plan * Receives and approves deliverables and ensures sustained adherence to schedule and budget commitments * Provides detailed knowledge of business requirements and standards, technical methods and existing processes * Identifies and co-ordinates required resources * Attends all status and directional meetings * Supports project manager in gaining and retaining buy-in and support from line manager and stakeholders | **Client** |
| [Name, Contact phone, Email] |
| **Red Hat** |
| [Name, Contact phone, Email] |
| **Expected Time Commitment** |
| [Example: 1 hour/weekly] |
| **D** | **Key Project Team Member(s)**  Project delivery against scope. | * Ensures clear understanding of assigned tasks and timeline for assigned deliverables * Reports potential delays promptly and presents alternative plans for avoiding or recovering from them * Completes assigned tasks on time, on budget and at specified quality * Attends status and directional meetings on requests * Supports project manager in gaining and retaining buy-in and support from line manager and stakeholders * Regularly communicates with project manager and provides opportunities for their input as it relates to assigned deliverables * Actively contributes to project's success | **Client** |
| [Name, Contact phone, Email] |
| **Red Hat** |
| [Name, Contact phone, Email] |
| **Expected Time Commitment** |
| [Example: 1 hour/weekly] |

# COMMUNICATIONS

1. **Update the communication plan column to fit the actions to be taken during the life of the project.**
2. **Fill in the names of the owners, participants, notifications and frequency.**

## COMMUNICATION CHANNELS

Identify and define all the different vehicles for disseminating project information to stakeholders for the duration of the project.

|  |  |  |  |
| --- | --- | --- | --- |
| **Channel** | **Type** | **Description** | **URL/Location** |
| **1** | **Project Repo**  document-management-software.jpg | * Project Artifacts * Knowledge Share | e.g. Confluence, Jira, Google Drive, Sharepoint  Ex: <https://drive.google.com/ABC_Project> |
| **2** | **Email**  email.png | * Announcements * Meeting Notes * Reporting * Team Communication | e.g. Mailing Lists  Ex: [ABC\_Project\_Team@customer.com](mailto:ABC_Project@customer.com) |
| **3** | **Chat**  ChatBubbles650.jpg | * Comms | Collaboration | e.g. Slack, RocketChat, IRC, other  Ex: #abc\_project |
| **4** | **Meeting (call)**  tel-meeting.png | * Planning * Reviews * Standups * Reporting | E.g. Dial in number  Ex: 1-800-123-4567, participant code 1234567 |
| **5** | **Meeting (video)**  index.jpg | * Planning * Reviews * Standups * Reporting | E.g. WebX, BlueJeans  Ex: <https://bluejeans.redhat.com/4445679876> |
| **6** | **In-person**  Screen Shot 2016-09-09 at 2.17.08 PM.png | * Planning * Reviews * Standups * Reporting |  |

## COMMUNICATION PLAN

The Project Manager is responsible for ensuring the logistics for each of the below meetings. Level of participation is based on upon activity

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **COMMUNICATION** | **CHANNEL** | **PARTICIPANT GROUP** | **NOTIFICATION GROUP** | **FREQUENCY** |
| **Customer Pre-Call** | 4 → 2 | A, B, C, D |  | Once |
| **Customer Kickoff** | 4 → 2 → 1 | A, B, C, D |  | Once |
| **Project Management Plan Review** | 5 → 2 → 1 | A, B, C | D | Once / Ad Hoc as needed for plan updates |
| **Status Meeting** | 4 → 2 | A, B | C, D | Weekly |
| **Status Report** | 2 | A, B, C, D |  | Weekly |
| **Governance Meeting / Steering Committee (if applicable)** | 5 → 2 → 1 | Executive, A, B, C | D | Monthly |
| **Sprint Planning** | 5 → 2 | A, B, D | C | Bi-weekly |
| **Daily Standups (if applicable)** | 4 | B, D | A, C | Daily |
| **Sprint Review and/or Retrospective** | 5 → 2 | A, B, D | C | Bi-weekly |
| **Closeout Meeting** | 5 → 2 → 1 | A, B, C, D |  | Once at project completion |

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# ESCALATION PATH

For timely response to unforeseen project challenges, it is pivotal to have clear and definite lines of communication and associated escalation paths. The following diagram defines the escalation paths for both [customer] and Red Hat project team members.

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**[Update the following diagram based on project complexity and level of leadership oversight required. Insert other names as applicable, e.g. Sales Management; remove higher levels of oversight that are not appropriate.]**



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# DELIVERY METHODOLOGY

**Select the appropriate delivery methodology below and delete the other. In some cases you may use a mixture of both**

Based on the needs of [insert client name] Red Hat will be using a/an [insert methodology] methodology to deliver your project.

## Traditional

The Red Hat team will deliver this project using a traditional waterfall project management methodology. The team will leverage the Red hat Services - Global Project Management Framework (shown below) to systematically take [client] from

**requirements gathering → design → development → testing → maintenance (operations)**

# Untitled.png

## 

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## 

## 

## Agile (SAFe/Scrum)

Red Hat Consultants will perform the Services per Agile Methodology in the “Sprints” identified below. Red Hat and [Client] will define and prioritize the project backlog based on the task list set forth in Statement of Work. The [Client] Product Owner will attend weekly and daily meetings in order to gain visibility to the Professional Services and progress of the team. The following iterative regularly scheduled meetings will be available for all [Client] project stakeholders but mandatory attendance is required for the [Client] Product Owner:

1. **Sprint Planning Meeting:** A Sprint planning meeting will be conducted at the beginning of each Sprint. Red Hat Consultants and the [Client] Product Owner will determine the scope of work from:
   1. The applicable pre-existing Product Backlog to be completed for the upcoming Sprint iteration and/or
   2. New Product Backlog items requiring completion for the upcoming Sprint iteration
2. **Daily Stand-Up Meetings:** Daily meetings will occur in order to:
   1. Review work completed the previous day
   2. Review work to be completed on the current day
   3. Determine potential impediments limiting the team’s or an individual’s ability to perform any aspect of the Professional Services for the upcoming daily assignments
3. **Sprint Review and/or Retrospective Meeting:** At the conclusion of each Sprint, the [Client] Product Owner and Red Hat Consultants will:
   1. Confirm the work completed to [Client] project stakeholders and review the team’s productivity
   2. Identify solutions to mitigate items that negatively impacted team progress
   3. Demo any compiled project code created during the applicable Sprint
   4. Review any issues in the code or application that were found in the Sprint review
   5. Discuss how to fix any issues identified in the applicable Sprint for the upcoming Sprint
4. **Sprint Table:** Sprints and their planned time frames are provided in the table below. The parties acknowledge such dates and Sprint outcomes may change, and are provided for planning and project management purposes only.

|  |  |
| --- | --- |
| **Description** | **Estimated Time Frame** |
| Sprint 0 | Week 1 |
| Sprint 1 | Week 2 through Week 4 |
| Sprint 2 | Week 5 through Week 7 |
| Sprint 3 | Week 8 through Week 10 |
| Sprint 4 | Week 11 through Week 13 |
| Sprint 5 | Week 14 through Week 16 |
| Sprint 6 | Week 17 through Week 18 |
| Sprint 7 | ... |

**Sprint Table**