**Project Management Plan**

**<Project Name>**

**Company Name**

**Street Address**

**City, State Zip Code**

**Date**

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# Introduction

The Introduction provides a high-level overview of the project and what is included in this Project Management Plan. This should include a high-level description of the project and describe the projects deliverables and benefits. Excessive detail is not necessary in this section as the other sections of the project plan will include this information. This section should provide a summarized framework of the project and its purpose. Look back at the Project Charter for information to include in this section.

# Project Management Approach

This section is where you outline the overall management approach for the project. This section should describe, in general terms, the roles and authority of project team members. It should also include which organizations will provide resources for the project and any resource constraints or limitations. If there are any decisions which must be made by specific individuals—for example authorizing additional funding by the project sponsor—this should also be stated here. It should be written as an Executive Summary for the Project Management Plan.

# Project Scope

State the scope of the project in this section. The scope statement from the project charter should be used as a starting point; however, the project plan needs to include a much more detailed scope than the charter. This detail should include what the project does and does not include. The more detail included in this section, the better the product. This will help to clarify what is included in the project and help to avoid any confusion from project team members and stakeholders.

# Milestone List

Provide a summary list of milestones including dates for each milestone. Include an introductory paragraph in this section which provides some insight to the major milestones. This section should also mention or discuss actions taken if any changes to the milestones or delivery dates are required.

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| --- | --- | --- |
| Milestone | Description | Date |
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# Schedule Baseline and Work Breakdown Structure

This section should discuss the WBS, WBS Dictionary, and Schedule baseline and how they will be used in managing the project’s scope. The WBS provides the work packages to be performed for the completion of the project. The WBS Dictionary defines the work packages. The schedule baseline provides a reference point for managing project progress as it pertains to schedule and timeline. The schedule baseline and work breakdown structure (WBS) should be created in Microsoft Project. The WBS can be exported from the MS Project file.

# Change Management Plan

This section should describe your change control process. Ideally, this process will be some type of organizational standard which is repeatable and done on most or all projects when a change is necessary. Changes to any project must be carefully considered and the impact of the change must be clear in order to make any type of approval decisions. Many organizations have change control boards (CCBs) which review proposed changes and either approve or deny them. This is an effective way to provide oversight and ensure adequate feedback and review of the change is obtained. This section should also identify who has approval authority for changes to the project, who submits the changes, how they are tracked and monitored.

For complex or large projects the Change Management Plan may be included as an appendix to the Project Management Plan or as a separate, stand-alone document. We have a detailed Change Management Plan template available on our website.

# Communications Management Plan

The purpose of the Communications Management Plan is to define the communication requirements for the project and how information will be distributed to ensure project success. You should give considerable thought to how you want to manage communications on every project. By having a solid communications management approach you’ll find that many project management problems can be avoided. In this section you should provide an overview of your communications management approach. Generally, the Communications Management Plan defines the following:

* Communication requirements based on roles
* What information will be communicated
* How the information will be communicated
* When will information be distributed
* Who does the communication
* Who receives the communication
* Communications conduct

For larger and more complex projects, the Communications Management Plan may be included as an appendix or separate document apart from the Project Management Plan. We have a detailed Communications Management Plan template available on our website.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Communication Type** | **Description** | **Frequency** | **Format** | **Participants/ Distribution** | **Deliverable** | **Owner** |
| Weekly Status Report | Email summary of project status | Weekly | Email | Project Sponsor, Team and Stakeholders | Status Report | Project Manager |
| Weekly Project Team Meeting | Meeting to review action register and status | Weekly | In Person | Project Team | Updated Action Register | Project Manager |
| Project Monthly Review (PMR) | Present metrics and status to team and sponsor | Monthly | In Person | Project Sponsor, Team, and Stakeholders | Status and Metric Presentation | Project Manager |
| Project Gate Reviews | Present closeout of project phases and kickoff next phase | As Needed | In Person | Project Sponsor, Team and Stakeholders | Phase completion report and phase kickoff | Project Manager |
| Technical Design Review | Review of any technical designs or work associated with the project | As Needed | In Person | Project Team | Technical Design Package | Project Manager |

Project team directory for all communications is:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Title** | **E mail** | **Office Phone** | **Cell Phone** |
|  |  |  | xxx-xxx-xxxx | xxx-xxx-xxxx |
|  |  |  | xxx-xxx-xxxx | xxx-xxx-xxxx |
|  |  |  | xxx-xxx-xxxx | xxx-xxx-xxxx |
|  |  |  | xxx-xxx-xxxx | xxx-xxx-xxxx |
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|  |  |  | xxx-xxx-xxxx | xxx-xxx-xxxx |
|  |  |  | xxx-xxx-xxxx | xxx-xxx-xxxx |
|  |  |  | xxx-xxx-xxxx | xxx-xxx-xxxx |

# Cost Management Plan

The Cost Management Plan clearly defines how the costs on a project will be managed throughout the project’s lifecycle. It sets the format and standards by which the project costs are measured, reported, and controlled. Working within the cost management guidelines is imperative for all project team members to ensure successful completion of the project. These guidelines may include which level of the WBS cost accounts will be created in and the establishment of acceptable variances. The Cost Management Plan:

* Identifies who is responsible for managing costs
* Identifies who has the authority to approve changes to the project or its budget
* How cost performance is quantitatively measured and reported upon
* Report formats, frequency and to whom they are presented

For complex or large projects the Cost Management Plan may be included as an appendix to the Project Management Plan or as a separate, stand-alone document. We have a detailed Cost Management Plan template available on our website.

# Procurement Management Plan

The Procurement Management Plan should be defined enough to clearly identify the necessary steps and responsibilities for procurement from the beginning to the end of a project. The project manager must ensure that the plan facilitates the successful completion of the project and does not become an overwhelming task to manage. The project manager will work with the project team, contracts/purchasing department, and other key players to manage the procurement activities.

For larger projects or projects with more complicated procurement management requirements, you can include the Procurement Management Plan as a separate document apart from the Project Management Plan. We have a detailed Procurement Management Plan available on our website.

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# Project Scope Management Plan

It is important that the approach to managing the projects’ scope be clearly defined and documented in detail. Failure to clearly establish and communicate project scope can result in delays, unnecessary work, failure to achieve deliverables, cost overruns, or other unintended consequences. This section provides a summary of the Scope Management Plan in which it addresses the following:

* Who has authority and responsibility for scope management
* How the scope is defined (i.e. Scope Statement, WBS, WBS Dictionary, Statement of Work, etc.)
* How the scope is measured and verified (i.e. Quality Checklists, Scope Baseline, Work Performance Measurements, etc.)
* The scope change process (who initiates, who authorizes, etc.)
* Who is responsible for accepting the final project deliverable and approves acceptance of project scope

We have a detailed Scope Management Plan available on our website which can be included as an appendix to the Project Management Plan for larger or more complex projects. Be sure to review it and determine if it's necessary for managing your project.

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# Schedule Management Plan

This section provides a general framework for the approach which will be taken to create the project schedule. Effective schedule management is necessary for ensuring tasks are completed on time, resources are allocated appropriately, and to help measure project performance. This section should include discussion of the scheduling tool/format, schedule milestones, and schedule development roles and responsibilities.

Be sure to check out the detailed Schedule Management Plan available on our website. The separate Schedule Management Plan is suitable for larger projects or projects where the schedule management is more formalized.

# Quality Management Plan

This section discusses how quality management will be used to ensure that the deliverables for the project meet a formally established standard of acceptance. All project deliverables should be defined in order to provide a foundation and understanding of the tasks at hand and what work must be planned. Quality management is the process by which the organization not only completes the work but completes the work to an acceptable standard. Without a thorough Quality Management Plan, work may be completed in a substandard or unacceptable manner. This section should include quality roles and responsibilities, quality control, quality assurance, and quality monitoring.

For larger or more complex projects, the Quality Management Plan may be included as an appendix or separate document. A detailed Quality Management Plan is available for use on our website.

# Risk Management Plan

This section provides a general description for the approach taken to identify and manage the risks associated with the project. It should be a short paragraph or two summarizing the approach to risk management on this project.

Since risk management is a science in itself, we have many risk management templates available on our website. Look for the detailed Risk Management Plan, Risk Register along with templates for performing a risk assessment meeting.

# Risk Register

# Staffing Management Plan

Discuss how you plan to staff the project. This section should include discussion on matrixed or projectized organizational structure depending on which is being used for this project. This section should also include how resources will be procured and managed as well as the key resources needed for the project.

# Resource Calendar

Include a Resource Calendar as part of your project plan. The resource calendar identifies key resources needed for the project and the times/durations they'll be needed. Some resources may be needed for the entire length of the project while others may only be required for a portion of the project. This information must be agreed to by the Project Sponsor and Functional Managers prior to beginning the project.

# Cost Baseline

This section contains the cost baseline for the project upon which cost management will be based. The project will use earned value metrics to track and manage costs and the cost baseline provides the basis for the tracking, reporting, and management of costs.

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| **Project Phase** | **Budgeted Total** | **Comments** |
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# Quality Baseline

This section should include the quality baseline for the project. The purpose of this baseline is to provide a basis for ensuring that quality can be measured to determine if acceptable quality levels have been achieved. It is important for all projects to clearly define and communicate quality standards and the quality baseline serves this purpose.

|  |  |  |
| --- | --- | --- |
| **Item** | **Acceptable Level** | **Comments** |
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# Sponsor Acceptance

Approved by the Project Sponsor:

Date:

<Project Sponsor>

<Project Sponsor Title>