PROJECT MANAGEMENT PLAN

***<Project Name>***



**Planning Phase**

**Instructions**

**Document Purpose**

The Project Management Plan defines the project objective and scope as well as how it is executed, monitored, and controlled during the Delivery Stage.

**Who Produces This Document**

The assigned Project Manager produces the Project Management Plan in collaboration with the project team members and in consultation with the functional organizations involved in the managerial and technical processes described herein.

**Using this Template**

|  |
| --- |
| *<To create a Project Management Plan from this template, simply:*   1. *Replace the title on the cover page with the name of your project and the organization information.* 2. *Replace the <italicized text> in the document header with your project name and information.* 3. *Save your document with a filename that is in accordance with current document naming standards.* 4. *Update the filename in the document footer by right-clicking and selecting “edit footer”.* 5. *Complete the entire template. Each section contains abbreviated instructions, shown in italics, which can be removed once your document is finalized. Tables are also provided as a suggested layout for some of the information required.* 6. *Update the table of contents by right-clicking and selecting Update Field, then update entire table.* 7. *Note: Replace all* *the text between the less than/greater than symbols “<…>” with project specific statements.* 8. *Update all automatic fields (e.g. last save date and filename on title page, table of contents, filename in footer) by placing the cursor on the fields and pressing F9.* 9. *Delete this page when the Project Management Plan is complete.>* |

**Revision History**

| Version Number | Description | Date Modified | Author |
| --- | --- | --- | --- |
| 1.0 |  |  |  |
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**Authority Signatures**

The Project Lead (Business Side) and the Project Manager agree to deliver the Delivery Stage of this project in accordance with this Project Management Plan and amend it periodically as project parameters change.

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| Prepared by: | | | |
|  | Signature | | |
| Please print: | |  |  |
|  | Name | ID | Date |

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| Approved by: | | | |
|  | | Signature | |
| Please print: |  |  |  |
|  | Name | Title | Date |

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# Executive Summary

<Describe the key issues driving the project. Clearly demonstrate the problem/opportunity and how resolution of this problem/opportunity provides best value, while meeting investment plan, business, technical or legal/political/regulatory objectives. Summarize the results of the Project Identification Stage (e.g. feasibility assessment and business case). Define the objectives of the project and the intended results. Define quantitative and measurable objectives that can be used as criteria by which key stakeholders will judge the success of the project. Some of this information can be extracted from the Project Charter.>

# Integration Management

*<Integration Management includes all of the processes required to unify, coordinate and manage all project elements to completion. Integration Management crosses all phases of projects and includes change management, execution, control and close out. Briefly describe how this will be accomplished.>*

## Project Team Structure

<Describe the organizational boundaries between the project and external entities. Define and describe communication with senior management, customers, subcontractors, purchasing, sales, marketing, legal, finance, procurement, installation and support organizations, standards or certification bodies, auditors, manufacturing, and the like.

Using a diagram, illustrate corporate governance bodies that may be involved in the approval process and describe their roles and responsibilities in section 2.2. Illustrate the project team structure and relationships in a style adapted to the project size and complexity (e.g. for small projects, the names of the team members can be included; for larger projects, the organizational chart should name the groups or entities that form the project team).

The diagram below illustrates an example.>



## Roles and Responsibilities

<List the major roles identified in the project team structure diagram as well as internal and external project stakeholders who are not specifically members of the project team. Describe their relevance to the project and their degree of interaction for specific project activities.>

|  |  |  |  |
| --- | --- | --- | --- |
| Project Position | Name | Responsibilities | External resource |
|  |  |  |  |
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## Change Management

<*Describe how change will be managed throughout the Delivery Stage of this project. This should include Change Management processes, roles and responsibilities, tools and techniques and reporting.>*

### Change Control

<*Describe the Change Control process that will be used including:*

* *Change governance*
* *Change identification and request management*
* *Impact analysis*
* *Change approval process*
* *Change tracking>*

## Project Close Out

<Include the plans necessary to ensure orderly close out of the project. Items in the close out plan should include a staff reassignment plan, a plan for archiving project materials, a plan for post-mortem debriefings of project personnel, and preparation of a final report to include lessons learned and analysis of project objectives achieved.>

# Scope Management

*<Describe how scope will be managed throughout the Delivery Stage of this project. This could include information on specific Scope Management processes such as scope verification and control, development of work breakdown structure, roles and responsibilities, tools and techniques and reporting.>*

## 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).

| Activities In Scope | Activities Out of Scope |
| --- | --- |
|  |  |
|  |  |

## Requirements Management

*<Requirements will feed into the details of the project and product scope. Describe how requirements will be gathered, detailed, validated, controlled and managed. Also include tools and processes that will be used, such as requirements mapping.>*

## Project Deliverables

<List the major items to be delivered to the customers, subcontractors, integrators, or other parties. As appropriate, list the deliverables, their recipients, interim and final delivery dates, and delivery method. A table like the one below is a good way to show this information.

The list should differentiate the project management deliverables (e.g. project schedule, communication plan, progress report, etc.) from the project deliverables (e.g. system, database, telecommunication equipment, system and user documentation, etc.).

| Deliverable | Recipients | Delivery Date | Delivery Method |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

### Work Activities

<Specify the various work activities to be performed in the project. A Work Breakdown Structure should be used to depict the work activities and the relationships among work activities.>

### 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. These assumptions will be validated during the planning process in the Delivery Stage.>*

### Stakeholders

*<Identify the individuals or organizations (e.g. customer, 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. (PMBOK) This is a preliminary estimate.>*

# Schedule Management

<*Describe how time will be managed throughout the Delivery Stage of this project. This should include processes that will be used to develop the schedule, roles and responsibilities, tools and techniques and reporting, PDM, CPM.>*

## Milestones

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

| **Description** | **Forecast Date** | **Gate / Approval** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
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## Schedule Control

<Specify the control mechanisms that will be used to measure the progress of the work completed at milestones. Specify the methods and tools used to compare actual schedule performance to planned performance and to implement corrective action when actual performance deviates from planned or required performance. A project schedule in the form of a Gantt chart should be created, preferably in a project tracking tool. Describe how and when schedules will be modified and how agreement and commitment to the revised schedules will be achieved.

# Cost Management

<*Describe how cost will be managed throughout the Delivery Stage of this project. This should include processes that will be used to develop the budget, roles and responsibilities, tools and techniques and reporting.>*

### Estimation

<Describes how project estimates will be prepared, including:

* The methods, tools, and techniques that will be used to estimate project size, effort, cost, schedule, and critical computer resource requirements.
* The timing of the estimates.
* Who will participate in the estimation process.
* How the estimates will be documented, reviewed, and reported.

You can include the actual estimates in this section or they can be stored elsewhere. For each estimate made, document the estimation method used, the assumptions made, and the confidence level for the estimate. Describe the rationale behind contingency buffers incorporated into estimates. Specify the methods to be used periodically to re-estimate the cost, time, and resources needed to complete the project.>

### Budget Allocation

<Provide a detailed breakdown of necessary resource budgets for each of the major work activities in the work breakdown structure. The activity budget should include the estimated cost for activity personnel and may include, as appropriate, costs for factors such as travel, meetings, computing resources, tools, special testing and simulation facilities, and administrative support. A separate line item should be provided for each type of resource in each activity budget. The work activity budget may be developed using a spreadsheet and presented in tabular form.>

### Budget Control

<Specify the control mechanisms to be used to measure the cost of work completed, compare planned cost to budgeted cost, and implement corrective action when actual cost does not conform to budgeted cost. The budget control plan should specify the intervals at which cost reporting will be done and the methods and tools that will be used to manage the budget. The budget plan should include frequent milestones that can be assessed for achievement using objective indicators to assess the scope and quality of work products completed at those milestones.

# Quality Management

<*Quality Management includes Quality Planning, Quality Assurance, Quality Control and Continuous Improvement. Describe how quality will be managed throughout the delivery stage of this project to ensure quality of deliverables. This should include processes that will be used during Quality Planning, the definition of Quality Standards, governance, roles and responsibilities, tools and techniques, continuous improvement and reporting.>*

## Quality Assurance

<Quality Assurance activities monitor and verify the effectiveness of processes used to manage and create the deliverables. Describe how quality assurance will be managed including governance, roles and responsibilities, tools and techniques and reporting.

## Quality Control

<Specify the mechanisms to be used to measure and control the quality of the work products. Quality control mechanisms may include verification and validation, peer reviews, design reviews, product testing etc.

# Human Resource Management

<*Describe how human resources will be managed throughout the delivery stage of this project. This should include how resource requirements will be determined, how resources will be acquired, how they will be developed and managed, roles and responsibilities, tools and techniques and reporting. HR management also includes team building and rewards and recognition.>*

### 7.1 Human Resources Acquisition

<Specify the number of human resources needed by skill area or project role, along with required skill levels, and the duration for which each resource is needed. Describe the anticipated resource profile (the mix of skills and effort levels needed at various times in the project), when people will be added to the project or depart from it, and how new team members will be oriented. Specify the sources of resources such as internal from your branch, internal from another branch within your organization, hiring of a new employee, or hiring of contractors. Document the following information in this section:

* Available internal candidates, their skill sets, and dates of availability
* Requirements for external candidates, including job classifications and descriptions
* Selection of candidates and assignments to tasks
* Availability and duration of assignment for all candidates

### 7.2 Human Resources Development

<Describe how human resources will be developed to ensure that they have the required skills and knowledge to complete project deliverables. Development usually includes project specific training but may include knowledge sharing, job shadowing and mentoring.>

# Communications 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 Analysis

*<Describe the process used to identify stakeholders, how they will impact and be impacted by the project. A stakeholder analysis will feed into a Stakeholder Management Plan.>*

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

## Project Reporting and Communication

<Identify the regular reports and communications expected of the project, such as weekly status reports, regular reviews, and as-needed communication. The exact types of communication vary between groups, but it is useful to identify the planned means at the start of the project. Specify the reporting mechanisms, report contents, and information flows used to communicate the status of requirements, schedule, budget, quality, risks, and other status indicators both within the project and to external stakeholders. A table such as the one below is a convenient way to describe the communication expectations.

| Type of Communication | Communication Schedule | Communication Mechanism | Initiator | Recipient |
| --- | --- | --- | --- | --- |
| *<Status Report>* | *<every Friday>* | *<team meeting>* | *<Project Manager>* | *<Project Team>* |

# Risk Management

<Specify the plan for identifying, analyzing, and prioritizing project risks. It should describe the procedures for contingency planning and the methods used in tracking risks, evaluating changes in individual risk exposures, and responding to those changes. Include a plan for ongoing risk identification throughout the project’s life cycle. Document the risks in a separate risk register. A large project should create a separate risk management plan. Identify the risk management tasks to be performed, the risk OPI (Office of Primary Interest), and the target date for completion of each task. Estimate the percentage of project effort or the number of hours planned for risk management activities. Incorporate risk management tasks into the project schedule and budget.

# References

The following documents are attached to this Project Plan for immediate reference.

|  |  |  |  |
| --- | --- | --- | --- |
| **Appendix** | **Document Name** | **E-DRM # /Version** | **Date** |
| A |  |  |  |
| B |  |  |  |
| C |  |  |  |
| Etc |  |  |  |