

INFO 5901: Project Plan, Part I

Due Monday 9/18 at 16:30.

A successful project outcome often depends on successful planning. For your first project milestone your group will create a project plan. The plan will help you pace your project's progress through the semester. This careful planning will also help ensure that your client is pleased with your final deliverables at the end of the semester.

Preliminary Steps

Before you write out your project plan, you'll want to learn more about your project. First, get to know your client and your project. You'll also want to coordinate between your team members and plan out each person's responsibilities for the project.

When meeting with your client, you should take notes. Your meeting's minutes should be shared with the entire team. This way everyone has a record of what was discussed with the client. It's also important that you take minutes because you will be **required** to submit them for Part II of your Project Plan.

Meet with Your Client

- Talk with your client.
- Identify goals and deliverables.
- Discuss the activities and tasks.
- Discuss potential challenges and risks.
- Propose a timeline.

Meet with Your Team

- Get to know your team.
- Plan a division of labor.

Project Plan

Once you've collected some initial information about the project, you are ready to start authoring your plan. The project plan consists of a written document and some supporting document(s) (e.g. project-plan-template.xlsx). In these documents you need to identify and justify the primary ideas of your project, describe the problem you plan to address and the methodologies you intend to use, outline the sources, tools, and techniques you will use to address the problem, provide a detailed timeline with your activities, and use a work distribution and plan for achieving the project goals. Your plan should include a Work Breakdown Structure (WBS). You should also identify key milestones and major tasks for the project.

When authoring your plan, be realistic and reasonable; avoid being ambitious. Your plan should be **conservative** in scope and timing. Tasks often take longer than you think so it's better to be conservative. Plus if you end up getting more work done than planned, your client will be excited as opposed to disappointed if you don't even get your planned work done.

Understand that unexpected events happen that cause deadlines to slip. You should also include a plan for mitigating any potential risks. It may be useful for your project plan to also include a risk mitigation matrix as a supporting document.

Tip: Use [project-plan-template.xlsx](#) to create a preliminary plan. All milestones should have owners, it's okay if your tasks don't yet have owners. Submit this as a supporting document but also use this preliminary plan to inform your written document.

Do Not...

- Do not make this a todo list.
- Do not include every single small item or task.
- Do not share your completed plan with your client. We will take care of this in Part II.

Submitting Your Plan

Zip all documents that are part of your project plan. Submit your complete project plan (.zip) to CMS. This will be a group submission; only one of you will need to submit the final document.

Make sure you include your **project letter and name** on all of your project plan's documents.

Rubric (100)

This rubric should help to give you some idea of what we think is important in your project plan. We reserve the right to change this rubric. However, it's probably close to what we'll use to grade your plan.

Do not create your project plan by checking off items from this rubric, this will almost certainly result in a lower grade. Read the above requirements and make sure you create a quality plan that meets the expectations outlined in this **entire** document.

Goals and Deliverables (30)

- Goals are clearly stated.
- Goals reflect customer perspective.
- At least 3 specific deliverables identified. *Since project may not be well defined yet, these may be short-term tasks to clarify longer term.*
- *If applicable*, goals describe potential business impact (financial, customer impact, market share etc.).

Activities and Tasks (30)

- Tasks completed last week are clearly stated.
- Tasks planned this week clearly stated.
- Names of owners (or "team") explicitly listed on all tasks/activities.
- Division of labor - each team member "owns" at least one task individually.

Challenges and Risks (30)

- Challenges and risks are clearly stated.
- Challenges and risks are specific.
- Team appears to be taking a complete view of possible risks (not just the first hurdle they are hitting).
- Risks include a proposed strategy or owner for mitigation (fixing the risk item).

Timeline (10)

- Timeline includes major items from Goals and deliverables list.