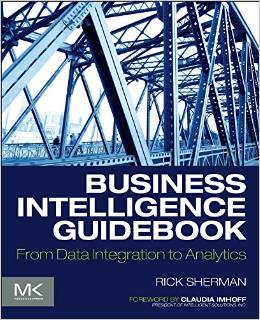
**Business Intelligence Guidebook**

**Templates**



**Chapter 2:**

**BI Project Milestone Plan Template**



[Company Name]

BI Project Milestone Plan

[Project Name]

Date: [Select Date]

Author(s):

Sponsor(s):

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|  |  |
| --- | --- |
|  | The content of the template is what is important rather than how is presented or formatted.  **Note: to delete any tip, such as this one, just click the tip text and then press the spacebar.** |

# BI Milestone Plan

|  |  |
| --- | --- |
|  | See the section “Developing Scope, Preliminary Plan, and Budget” in Chapter 2 of the BI Guidebook for a discussion of the use and content of a BI project milestone plan. More in-depth discussion on developing a detailed project plan can be found in Chapter 18: “Project Management.” |

## Milestone Plan

|  |  |
| --- | --- |
|  | Present a project milestone plan listing the project phase completion dates and key milestones |

Table 1: BI Project Milestone Plan

| **Phases** | **Milestones** | **Completion Date** | **Person Responsible** |
| --- | --- | --- | --- |
|  | BI Project Start |  |  |
| **Scope & Plan** |  |  |  |
|  | Business Justification Sign-Off |  |  |
|  | Project Plan Sign-off |  |  |
| **Analysis & Definition** |  |  |  |
|  | Business Requirements Sign-off |  |  |
|  | Data Architecture Analysis Completed |  |  |
|  | Technical Architecture Analysis Completed |  |  |
|  | Software & Infrastructure Sign-Off |  |  |
| **Architect & Design** | **Database Design Completed** |  |  |
|  | Data Integration Architecture & Design Completed |  |  |
|  | BI Architecture & Design Completed |  |  |
| **Pilot** |  |  |  |
|  | DI Pilot Completed |  |  |
|  | BI Pilot/POC Application Completed |  |  |
| **Build & Test** |  |  |  |
|  | Data Integration Development & Testing Completed |  |  |
|  | BI Application Development & Testing Completed |  |  |
|  | Source Data Loaded |  |  |
|  | User Acceptance Testing (UAT) Completed |  |  |
|  | Systems Testing Completed |  |  |
| **Implement** |  |  |  |
|  | User Training Completed |  |  |
|  | BI & DI Operations Verified |  |  |
|  | BI Applications Access & Verified |  |  |
| **Deployment** |  |  |  |
|  | BI & DI Production Monitoring & Controls Verified |  |  |
|  | BI Roll-Out Completed |  |  |
|  | BI Project Completed |  |  |

## Resource Plan

|  |  |
| --- | --- |
|  | Provide the high-level resource plan or assumptions used to formulate the project milestone plan.  Notes:   * Resource Type – examples are BI developers, project manager, business analysts * FTEs = Full-Time Equivalent Resources, such as 3.5 people needed. |

Table 2: High-level Resource Plan

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Resource  Type | Internal vs  External | Resource’s Organization | FTEs  Resources | Start  Date | Finish  Date | Approved  (Y/N/P) |
|  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| Totals |  |  |  |  |  |  |

## Project Assumptions

|  |  |
| --- | --- |
|  | Provide a brief description of the assumptions that were made in project planning. These assumptions may include business conditions, technical capabilities, resource availability, resource skills or deployment conditions. |

# Approvals

|  |  |
| --- | --- |
|  | It is a best practice to obtain sign-off approval of each project milestone. An organization’s policies and culture will dictate who the approvers will be, but typically the sponsors and key stakeholders are included. |

|  |  |  |
| --- | --- | --- |
| Title | Name | Approval  Date |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Appendix: Background Materials

|  |  |
| --- | --- |
|  | This section includes all background or supporting materials for the BI Milestone Plan. These materials may include:   * The milestone plan assumptions such as resources, funding, etc. * A more detailed project plan, if defined |

## Authors and contributors

|  |  |
| --- | --- |
|  | List all the people involved in obtaining and analyzing the requirements along with the authors of this deliverable. |