Creating a project plan: Tools and templates

Project plans are critical because they are used to capture the scope and time it takes to complete a project. The project plan is essentially the project's blueprint—it lays out all of the activities and milestones that your team needs to achieve in order to successfully complete the project. Project plans come in various shapes, sizes, and forms. Depending on the project you are managing, the template you use may vary, and some companies even have standard templates they require their project managers to use.

In the previous videos, you learned about various tools and techniques to create a project plan. But how do you know which tools and techniques to use and when? As a general rule, it is best to use a spreadsheet for a simple project and project management software for a more complex project. Regardless of what tool you use, be sure to include this key information:

Task ID numbers or **task names**: You might end up with dozens, hundreds, or even thousands of tasks in a project. Assigning a task ID or name makes it easy to find and reference a task when communicating with team members and stakeholders.

Task durations: A task duration is the amount of time you estimate that task should take. Adding task durations to your project plan helps you organize and prioritize the tasks in the project to help ensure you hit your goal on time.
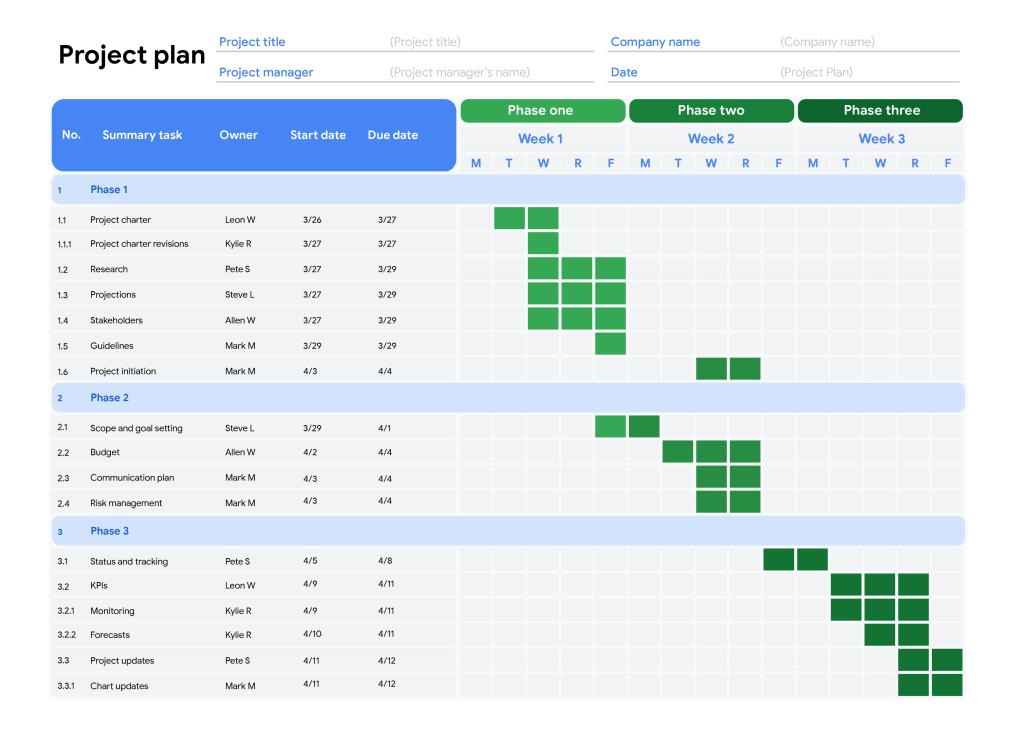
Start and finish dates: Including start and finish dates for each task helps you track whether you are progressing on time or not.

Who is responsible for what: Including each team member's role and responsibilities helps promote clarity and efficiency. As a best practice, assign an owner to each task, as well.

Using a spreadsheet to build a project plan

Spreadsheets are an excellent tool to use for project plans, particularly for projects that are less complex and that have a clear assignment of tasks. Spreadsheets can require a lot of manual input of information, but as a project manager, you may find that you like the control that spreadsheets provide. Spreadsheets are also customizable, so you can tailor them to your project's needs.

The graphic below shows what a project plan for a website launch might look like in a simple spreadsheet.

Project plan

Project title	(Project title)	Company name	(Company name)
Project manager	(Project manager's name)	Date	(Project Plan)

No.	Summary task	Owner	Start date	Due date	Phase one / Week 1 — M	T	W	R	F	Phase two / Week 2 — M	T	W	R	F	Phase three / Week 3 — M	T	W	R	F
1	**Phase 1**																		
1.1	Project charter	Leon W	3/26	3/27		■	■												
1.1.1	Project charter revisions	Kylie R	3/27	3/27			■												
1.2	Research	Pete S	3/27	3/29			■	■	■										
1.3	Projections	Steve L	3/27	3/29			■	■	■										
1.4	Stakeholders	Allen W	3/27	3/29			■	■	■										
1.5	Guidelines	Mark M	3/29	3/29					■										
1.6	Project initiation	Mark M	4/3	4/4						■	■								
2	**Phase 2**																		
2.1	Scope and goal setting	Steve L	3/29	4/1		■	■												
2.2	Budget	Allen W	4/2	4/4						■	■	■							
2.3	Communication plan	Mark M	4/3	4/4							■	■							
2.4	Risk management	Mark M	4/3	4/4							■	■							
3	**Phase 3**																		
3.1	Status and tracking	Pete S	4/5	4/8									■	■					
3.2	KPIs	Leon W	4/9	4/11											■	■	■		
3.2.1	Monitoring	Kylie R	4/9	4/11											■	■	■		
3.2.2	Forecasts	Kylie R	4/10	4/11												■	■		
3.3	Project updates	Pete S	4/11	4/12													■	■	
3.3.1	Chart updates	Mark M	4/11	4/12													■	■	

Pro tip: It is important to incorporate your **Work Breakdown Structure (WBS)** numbers into your project plan. In this example, the ID numbers directly relate to the WBS numbers, which is a helpful way to maintain consistency.

Spreadsheet templates

It is helpful to try online tutorials so that you can get used to the different functionalities and user interfaces of each tool. We have included links to some project plan templates below:

Smartsheet: Project Plan Templates for Microsoft Word↗

Smartsheet: Project Plan Templates for Google Sheets↗

Google Project Plan Timeline Template↗

Microsoft Gantt Chart Template↗

Work management tools

There are many work management tool options available for you to utilize when planning your project. We covered some of these in previous videos, but as a refresher, it is important to keep in mind that every company, project manager, and customer has a work management tool preference. You may come across tools like Smartsheet↗, Asana↗, Jira↗, Trello↗, and many more**.** These tools allow for collaboration and communication at a task level.

Key takeaway

The tool you use to create your project plan should help you collect and track project details, manage your schedule, and visualize how your project is progressing. A clear, thorough, and organized project plan can help create the recipe for project management success.

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