



PROJECT MANAGEMENT PLAN TEMPLATE

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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. 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. It should be written as an Executive Summary for the Project Management Plan.

The Project Manager, <Project Manager Name> has the overall authority and responsibility for managing and executing this project according to this Project Plan and its Subsidiary Management Plans. The project team will consist of personnel from <Project Team Staffing Source>.

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.

MILESTONE LIST

Provide a summary list of milestones including dates for each milestone. Include an introductory paragraph in this section which talks about the major milestones.

| Milestone | Description | Date |
|-----------|-------------|------|
| | | |
| | | |
| | | |
| | | |

SCHEDULE BASELINE AND WORK BREAKDOWN STRUCTURE

The schedule baseline and work breakdown structure (WBS) should be created in Microsoft Project. The WBS can be exported from the MS Project file.

The Project Schedule Baseline and Work Breakdown Structure are provided in Appendix A, Project Schedule and Appendix B, Work Breakdown Structure.

PROJECT CHANGE CONTROL PROCESS

Describe your change control process here. Identify who has approval authority for changes to the project, who submits the changes, how they are tracked and monitored.

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. 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

This Communications Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout the life of the project and will be updated as communication needs change. This plan identifies and defines the roles of persons involved in this project. It also includes a communications matrix which maps the communication requirements of this project. An in-depth guide for conducting meetings details both the communications rules and how the meetings will be conducted, ensuring successful meetings. A project team directory is included to provide contact information for all stakeholders directly involved in the project.

Approximately 80% of a Project Manager's time is spent communicating. Think about it – as a Project Manager you are spending most of your time measuring and reporting on the performance of the project, composing and reading emails, conducting meetings, writing the project plan, meeting with team members, overseeing work being performed and even a few martini lunches once in a while.

You should give considerable thought to how you want to manage communications on this project. By having a solid communications management approach you'll find that many project management problems can be avoided. In this section give an overview of your communications management approach.

The Project Manager will take a proactive role in ensuring effective communications on this project. The communications requirements are documented in the Communications Matrix presented in this document. The Communications Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it and to whom to communicate.

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. 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

The Project Manager will be responsible for managing and reporting on the project's cost throughout the duration of the project. During the monthly project status meeting, the Project Manager will meet with management to present and review the project's cost performance for the preceding month. Performance will be measured using earned value. The Project Manager is responsible for accounting for cost deviations and presenting the Project Sponsor with options for getting the project back on budget. The Project Sponsor has the authority to make changes to the project to bring it back within budget.

This section you explain your approach to cost management for your project. We chose to create Cost Accounts at the fourth level of the WBS as an example since many project management offices don't have a Project Management Information System. If you are using a Project Management Information System then you can, and should, manage costs down to the work package level. For those who don't have a Project Management Information System you'll want to determine which level of the WBS you can most effectively manage the project's costs from. The further down in the WBS you go, the more detailed your cost management is. However, you should balance the granularity at which you want to manage costs against the amount of effort it takes to manage at that level. The more granular your cost management, the more work is necessary to manage it.

Costs for this project will be managed at the fourth level of the Work Breakdown Structure (WBS). Control Accounts (CA) will be created at this level to track costs. Earned Value calculations for the CA's will measure and manage the financial performance of the project. Although activity cost estimates are detailed in the work packages, the level of accuracy for cost management is at the fourth level of the WBS. Credit for work will be assigned at the work package level. Work started on work packages will grant that work package with 50% credit; whereas, the remaining 50% is credited upon completion of all work defined in that work package. Costs may be rounded to the nearest dollar and work hours rounded to the nearest whole hour.

Cost variances of +/- 0.1 in the cost and schedule performance indexes will change the status of the cost to cautionary; as such, those values will be changed to yellow in the project status reports. Cost variances of +/- 0.2 in the cost and schedule performance indexes will change the status of the cost to an alert stage; as such, those values will be changed to red in the project status reports. This will require corrective action from the Project Manager in order to bring the cost and/or schedule performance indexes below the alert level. Corrective actions will require a

project change request and be must approved by the Project Sponsor before it can become within the scope of the project.

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 in itself 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.

The Project Manager will provide oversight and management for all procurement activities under this project. The Project Manager will work with the project team to identify all items to be procured for the successful completion of the project. The Project Management Office (PMO) will then review the procurement list prior to submitting it to the contracts and purchasing department. The contracts and purchasing department will review the procurement items, determine whether it is advantageous to make or buy the items, and begin the vendor selection, purchasing and the contracting process.

PROJECT SCOPE MANAGEMENT PLAN

It is important that the approach to managing the projects' scope be clearly defined and documented in detail. 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. Be sure to review it and determine if it's necessary for managing your project.

For this project, scope management will be the sole responsibility of the Project Manager. The scope for this project is defined by the Scope Statement, Work Breakdown Structure (WBS) and WBS Dictionary. The Project Manager, Sponsor and Stakeholders will establish and approve documentation for measuring project scope which includes deliverable quality checklists and work performance measurements. Proposed scope changes may be initiated by the Project

Manager, Stakeholders or any member of the project team. All change requests will be submitted to the Project Manager who will then evaluate the requested scope change. Upon acceptance of the scope change request the Project Manager will submit the scope change request to the Change Control Board and Project Sponsor for acceptance. Upon approval of scope changes by the Change Control Board and Project Sponsor the Project Manager will update all project documents and communicate the scope change to all stakeholders. Based on feedback and input from the Project Manager and Stakeholders, the Project Sponsor is responsible for the acceptance of the final project deliverables and project scope.

SCHEDULE MANAGEMENT PLAN

This section provides a general framework for the approach which will be taken to create the project schedule. This includes 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.

Project schedules will be created using MS Project 2007 starting with the deliverables identified in the project's Work Breakdown Structure (WBS). Activity definition will identify the specific work packages which must be performed to complete each deliverable. Activity sequencing will be used to determine the order of work packages and assign relationships between project activities. Activity duration estimating will be used to calculate the number of work periods required to complete work packages. Resource estimating will be used to assign resources to work packages in order to complete schedule development.

Once a preliminary schedule has been developed, it will be reviewed by the project team and any resources tentatively assigned to project tasks. The project team and resources must agree to the proposed work package assignments, durations, and schedule. Once this is achieved the project sponsor will review and approve the schedule and it will then be baselined.

The following will be designates as milestones for the project schedule:

- Completion of scope statement and WBS/WBS Dictionary
- Baselined project schedule
- Approval of final project budget
- Project kick-off
- Approval of roles and responsibilities
- Requirements definition approval
- Completion of data mapping/inventory
- Project implementation
- Acceptance of final deliverables

Roles and responsibilities for schedule development are as follows:

The project manager will be responsible for facilitating work package definition, sequencing, and estimating duration and resources with the project team. The project manager will also create the project schedule using MS Project 2007 and validate the schedule with the project team, stakeholders, and the project sponsor. The project manager will obtain schedule approval from the project sponsor and baseline the schedule.

The project team is responsible for participating in work package definition, sequencing, and duration and resource estimating. The project team will also review and validate the proposed schedule and perform assigned activities once the schedule is approved.

The project sponsor will participate in reviews of the proposed schedule and approve the final schedule before it is baselined.

The project stakeholders will participate in reviews of the proposed schedule and assist in its validation.

QUALITY MANAGEMENT PLAN

Discuss the process you'll use to ensure that the quality of the products from this project meet the requirements.

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.

The approach we have taken to manage risks for this project included a methodical process by which the project team identified, scored, and ranked the various risks. The most likely and highest impact risks were added to the project schedule to ensure that the assigned risk managers take the necessary steps to implement the mitigation response at the appropriate time during the schedule. Risk managers will provide status updates on their assigned risks in the bi-weekly project team meetings, but only when the meetings include their risk's planned timeframe. Upon the completion of the project, during the closing process, the project manager will analyze each risk as well as the risk management process. Based on this analysis, the project manager will identify any improvements that can be made to the risk management process for future projects. These improvements will be captured as part of the lessons learned knowledge base.

RISK REGISTER

The Risk Register for this project is provided in Appendix C, Risk Register.

STAFFING MANAGEMENT PLAN

Discuss how you plan to staff the project. Does your organization have a matrixed management structure? If so, then you'll need to discuss how resources will be procured and managed. Also include 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.

COST BASELINE

This section contains the cost baseline for the project. Cost management will be based on this baseline.

QUALITY BASELINE

Include the quality baseline in this section to ensure that quality can be assured as measured against this baseline.

SPONSOR ACCEPTANCE

Approved by the Project Sponsor:

_____ Date: _____
<Project Sponsor>
<Project Sponsor Title>

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