

PROJECT NAME

PROJECT PLAN FOR

COMPANY NAME

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3. Replace the phrase 'Company Name' in the document with the name of the given project's or client's company.
4. Repeat Step 3 for 'Project Name' as well.
5. Not all sections of this document are relevant to all projects; you should delete those sections not applicable to your project.
6. This document is intended to serve as a TEMPLATE. Carefully review all information and tables in this document, delete that information which is not suitable for your project, revise it, and 'fill in the blanks' to tailor it to your project.
7. All revisions to this document should be identified and accounted for in the Document History section on page 2.
8. Remember to re-insert a new Table of Contents into the document after completing or substantially revising the document, before sending it out for review or approval.
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DOCUMENT HISTORY

All revisions to the 'master' copy of this document should be identified here through the life of the plan (i.e., until project completion).

DOCUMENT VERSION	CONTRIBUTORS	SECTIONS REVISED	APPROVED BY (if client signature required; include printed name also)	DATE

SCOPE & PURPOSE OF THIS DOCUMENT

This project plan is designed to serve as the main source for definitive information on defining and achieving the objectives of the Project Name project for Company Name. This document contains the project scope, objectives, requirements, assumptions, constraints and other information relevant to the successful completion of this project, based on discussions with Company Name and our understanding of the project to date.

This document is designed to be updated and refined prior to actual project task execution to ensure that all relevant requirements, assumptions, risk factors, and other elements that may positively or negatively impact the execution and completion of the project have been fully identified, defined and agreed on prior to project task execution. In fact many of the sections in this preliminary project plan are designed to serve as placeholders, with information and detail to be filled in based on input from all relevant project stakeholders. Anyone reading this document is strongly encouraged to contribute to it.

Additional revisions can be made to this plan during project execution as agreed upon. The definitive version of this document will serve as the sole source of all information regarding project objectives, tasks, and execution approach for this project, as well as the baseline against which project progress and outcome are measured.

PROJECT MANAGEMENT APPROACH

This document is based on the project management processes and approach as described and defined by the Project Management Institute's Project Management Body of Knowledge (PMBOK®), an ANSI standard widely recognized as the most effective and definitive approach to successful project management.

1. PROJECT SCOPE STATEMENT: PROJECT GOAL & OBJECTIVES

The scope of this project can be summarized as follows:

INSERT SCOPE STATEMENT HERE.

We have also identified specific, multiple objectives whose achievement will lead to attainment of the goal defined in the Scope Statement. These objectives are:

INSERT OBJECTIVES (SUB-GOALS, MILESTONES, ETC.) HERE AS NECESSARY

Based on the project scope and objectives, the specific deliverables for this project can be identified as follows:

LIST DELIVERABLES IF NECESSARY (IF DIFFERENT THAN GOAL/OBJECTIVES)

2. PROJECT ASSUMPTIONS

This section provides information on the assumptions and/or constraints for this project.

2.1

2.2

3. PROJECT TASKS & ASSIGNMENTS

3.1 WORK BREAKDOWN STRUCTURE

The goal(s), objectives, and deliverables for this project can be broken down into the following tasks or activities. The level of detail of the tasks shown should be granular enough to allow for accurate estimation of the work effort required for each task, but not so detailed that administration of project tasks requires excessive overhead. A generally accepted rule-of-thumb is that no single task in the Work Breakdown Structure requires less than 80 hours to complete; breaking those activities further down into sub-tasks generally decreases administrative and managerial effectiveness and may increase their attendant costs.

INSERT WBS HERE

3.2 RESPONSIBILITY ASSIGNMENT MATRIX

The table below identifies major project tasks and requirements and the name of the resource responsible for that task or requirement. The purpose of this table is to identify the project team members and their exact roles and responsibilities.

Note that actual staffing decisions and assignments generally cannot be firmly established until the definitive project plan has been completed. The Responsibility Assignment Matrix must reflect this level of uncertainty. For example, the RAM below is representative of a matrix for an application development project while in the early planning stages.

PERSON PHASE	A	B	C	D	E
Requirements	S, I	A, I		P	P
Graphic Design	S, I	A, I		P	
Functional Design	S	A, I			P
Development	S	A, I			P
Testing	S	A, I			P, R
Deployment	S, I	A, I	R		P
Final Approval	S	A	R		

KEY

S = Sign-off Required
P = Participant
A = Accountable
I = Input Required
R = Review Required

In the example RAM above, Person roles are represented as follows:
A = Project Sponsor (Client)
B = Project Manager
C = Account Manager
D = Project Team Member (Graphics Team)
E = Project Team Member (Coding Team)

4. PROJECT SCHEDULE

4.1 SCHEDULED PROJECT START AND COMPLETION DATES

- Scheduled Project Start Date:
- Scheduled Project Completion Date:

4.2 PROJECT SCHEDULE NETWORK DIAGRAM

Based on a project team review of the tasks defined in the Work Breakdown Structure, their dependencies and inter-relationships, and the estimated duration required to complete each activity, the preliminary schedule for this project can be diagrammed as follows:

INSERT NETWORK DIAGRAM

4.3 MILESTONE-ORIENTED PROJECT SCHEDULE

The Gantt chart below shows the project schedule and the dates scheduled for completion of key deliverables:

OPTIONAL: GANTT CHART VERSION OF ABOVE

5. SCOPE MANAGEMENT PLAN

The purpose of this section is to describe the measures that will be employed to ensure that project work is properly authorized and executed to achieve the desired result, and to define the processes that will be used to control any requested or required changes to project scope or product (deliverable) characteristics.

5.1 PROJECT BUDGET-AT-COMPLETION

The total estimated cost of this project is \$. Please note that this figure does/does not include estimated costs for any required third-party software or hardware components, which are identified in the section on Procurement Management. The Budget At Completion figure shown above is the established cost baseline for this project against which cost and schedule performance will be measured.

5.2 SCHEDULE & COST MANAGEMENT PLAN

Project schedule and cost will be managed by 'best practice' proactive project management techniques including inspection and testing of reported work results. Standard performance measurement techniques will also be used as necessary to track project status.

5.3 CHANGE MANAGEMENT PLAN

This section details the specific measures that will be employed to manage changes to project scope, goals or objectives as well as modifications to system or product characteristics or the implementation thereof. The change management process outlined below is depicted on the following page.

- 5.3.1 Any requested changes to the project Scope, including both formal and informal change requests, must be communicated to the Our Company project manager assigned to this project for consideration and assessment.
- 5.3.2 All requested changes will be analyzed and vetted by the Project Team assigned to this project for any implications regarding impact to project cost and/or schedule.
- 5.3.3 The results of the Change Request Assessment outlined in 5.3.2 will be provided to the client in writing, indicating any possible impact(s) to project cost or schedule. This document, the Change Order document, will include a summary of the requested change, and its expected impact on project cost and/or schedule.
- 5.3.4 The Client will then either accept or reject the Change Order. The client is also welcome to contact the Project Manager to discuss these findings as desired. Acceptance of the change order and its impact on project cost and/or time must be signified by client/sponsor signature on the Change Order document, which must then be faxed or otherwise sent to the Project Team. The Project Manager is responsible for contacting the client/sponsor to confirm that the signed Change Order has been received and outlining when/how the work defined in the Change Order will be executed.
- 5.3.5 Approved changes impacting project scope, cost, and/or schedule, or any other element noted in the Project Plan, must be integrated into the latest iteration of the Project Plan.
- 5.3.6 If the client does not return a signed copy of the Change Order, the change will not be implemented. The Project Manager is responsible for contacting the client/sponsor to confirm that the requested change will not be made.

Project Change/Feature Request Order Form

Details of Requested Change:

Requested by _____ (name) on _____ (date)

Change Impact Assessment

Estimated Impact on Project Cost:

Estimated Impact on Project Schedule:

Estimated Impact on Project and/or Product Quality:

Estimated Impact on Project and/or Product Risk:

IF change requires a revision to project Scope Statement, revised Scope Statement:

I have read the above information and understand and accept the implications of this requested Change, including the revised Scope Statement, if any. I hereby authorize this Change to be implemented by the Project Team and accept the conditions and implications of the Estimated Change Impacts outlined herein.

Authorized by _____ (print name and title)

Signature: _____

Date: _____

6. RISK MANAGEMENT PLAN

The purpose of this section is to identify relevant risk factors, or those factors that may positively or negatively impact the outcome of the project, and to plan for the measures to mitigate or eliminate each risk factor. The main emphasis in this section is to identify those risks that may negatively impact the outcome of the project, its cost, and schedule, and to establish plans to mitigate or eliminate those risks.

6.1 RISK IDENTIFICATION & ANALYSIS

The table below lists the project risks identified thus far, categorized by type of risk (external, project management, internal, or organizational), and the trigger or warning sign for that risk event (i.e., an event or occurrence that indicates the risk event is about to happen or has already happened). This table can be populated based on the vetted results of a brainstorming session, expert input, or review of analogous project risks. The Risk Assessment Form, available under separate cover, is also a valuable tool to guide and order the output from brainstorming sessions or input interviews.

RISK CATEGORY	RISK EVENT	TRIGGER/INDICATOR
External		
External		
Internal		
Internal		
Organizational		
Organizational		
Technical, Quality, or Performance		
Technical, Quality, or Performance		

6.1.2 QUALITATIVE RISK ANALYSIS

The table below lists the project risks identified thus far, and the estimated Probability (percentage chance of occurrence) and Impact (cardinal value of impact or affect on project cost, time, or scope) for each risk. The Probability for any given risk event falls between 0.0 (no probability) and 1.0 (certainty). The Impact values below represent a linear cardinal number scale, ranging from .1-.9 (odd numbers only). These numbers should however be adjusted as necessary to reflect your company’s attitude and policies regarding risk. The current linear scale provided is generally appropriate for a company that accepts or embraces risk (risk-seeking); however, a non-linear scale, such as one with the values .1, .2, .4, .8, would be more appropriate for a company that is risk-averse, since these values better reflect the organization’s desire to avoid high-impact risks.

RISK EVENT	PROBABILITY	IMPACT (.1, .3, .5, .7, .9)	RISK EVENT RATING

6.1.3 QUANTITATIVE RISK ANALYSIS

The table below lists those project risks identified thus far that appear to require further analysis and/or management. This table shows the Probability (percentage chance of occurrence) and Impact (estimated cost or monetary value of risk event) for each risk. This table is designed to quantitatively identify the ramifications of each risk event to identify those risks that should be addressed in the Risk Response Plan. The formula to calculate the value of any given risk event is Probability x Impact; this value is shown in the Risk Event Value column. The Probability for any given risk event falls between 0.0 (no probability) and 1.0 (certainty). An estimated dollar value has been assigned to each Risk based on expert input.

This table must be completed prior to developing an effective Risk Response Plan.

RISK EVENT	PROBABILITY	IMPACT (in \$)	RISK EVENT VALUE

6.2 RISK RESPONSE PLAN

Based on the analysis of relevant project risks provided in the previous section, a risk response plan can be developed. The Risk Response Plan is implemented when any identified Risk Event Trigger occurs. Monitoring of the project, its progress, its outputs, and its mandatory dependencies is therefore necessary throughout the course of the project to ensure that risk response plans are properly implemented as necessary in a timely manner. The Risk Response Plan covers only those risks that have been deemed 'high hazard', or those with the most dollar value. The final decision on which risks to include in the Risk Response Plan must be made by the Client, based on the Client organization's attitude and/or organizational policies regarding risk.

7. QUALITY MANAGEMENT PLAN

This section outlines the measures to ensure that project fulfills its stated goals and objectives (quality assurance) and that the output(s) or product(s) of the project satisfy relevant standards or requirements (quality control).

7.1 QUALITY ASSURANCE

Quality assurance, or the process of ensuring that the project is using the most effective procedures and processes available to meet project objectives, will be provided through the ongoing tracking and measurement of project progress by the Project Manager, as well as by use of the findings generated in the quality control process.

7.2 QUALITY CONTROL

Quality Control is provided by measuring the individual and combined components of the given application, system, or product to ensure that the product fulfills its relevant standards and/or specifications.

7.2.1 QUALITY CONTROL TESTING PROCEDURES

Quality Control will be exercised through the use of the mechanisms outlined below. Note that not all mechanisms are available or required on each project. The definitive project plan should reflect only those quality control mechanisms that will actually be used for that project.

- 7.2.1.1 Review of system or component design plans, diagrams, and other 'blueprints' by project team members and stakeholders (stakeholders identified for this process are specified in the Communications Management section). Workflow/business process diagrams, if any, will be created using the Rational Rose software suite, which allows for easier translation of the logic expressed in such diagrams into actual functional application code.
- 7.2.1.2 Testing of individual code components or modules prior to incorporation into the larger system.
- 7.2.1.3 Testing of completed 'builds' or combined code at logical points in the project.
- 7.2.1.4 Initial Development build testing: This is a functional test of the system or product following its initial completion in the Development environment.
- 7.2.1.5 Final review of Development build: This review is the formal process of accepting the completed system or product as it exists in the Development environment. This acceptance initiates the Production rollout process (taking the system 'live', pilot-program launch, etc.).
- 7.2.1.6 Production Environment Testing: This review culminates in the formal process of Client acceptance of the completed system or product as it exists in the Production environment.

7.2.2 QUALITY CONTROL REPORTING

The majority of Quality Control processes are performed internally by individual programmers on an ongoing basis to ensure total product, application, or system quality. Reporting the results of each test would therefore be counter-productive to programmer productivity, entail additional administrative overhead, and result in both an increased total project cost and extended schedule. The majority of Quality Control testing results will therefore not be provided to the Client.

Quality Control test results and related reports that will be provided to the Client are:

7.2.2.1 Initial Development Build Test Results

7.2.2.2 Final Development Build Test Results

7.2.2.3 Production Environment Test Results

7.2.2.4 Test result/quality control reports may consist of:

- Checklists: Measurable, verifiable characteristics of the given component or system. An example of a checklist item for a single Web page is “page loads in less than 15 seconds on a dial-up, 56Kbps Internet connection”. Checklist items are often assigned a simple pass/fail value.
- Process Flow Confirmation Report: Testing the given application, system, or product based on the most recently approved version of the process workflow diagram developed to express the desired functioning of that application, system, or product. This testing is designed to answer the question, “Does the application, system, or product fulfill its functional specifications or perform the tasks for which it was developed?”

7.2.3 ACCEPTANCE CRITERIA

Any system or sub-system component thereof shall be deemed accepted if that component or system fulfills its stated functional specification(s), based on the results of Quality Control testing and inspection.

8. PROCUREMENT MANAGEMENT PLAN

This section details how the project will undertake the acquisition of goods or services necessary to meet project objectives from any company or party external to Our Company or Company Name. Identification of the requirement to make such an acquisition should be made in the early planning stages of the project, in this section of the project plan.

8.1 EXPECTED PROCUREMENT ITEMS

The following third-party items are expected to be required for the successful completion of this project:

ITEM	EST. COST RANGE	EST. REQUIRED QUANTITY	TOTALS

8.2 SOURCE SOLICITATION & SELECTION

8.2.1 Weighted Vendor Matrix

The table below represents a standard weighted vendor matrix to aid in vendor/source selection. This is a standard tool employed to help eliminate personal prejudices or favoritism in vendor or source selection. The Evaluation Criteria in the first column were selected by identifying the most important criteria by which Company Name will most likely judge a provider of the given product or service. These criteria were then assigned a 'weight', indicating the relative importance of the given criterion to Company Name in the overall decision process. These factors should be revised as necessary to reflect the actual criteria important to Company Name.

Evaluation Criteria	Vendor A	Vendor B	Vendor C	Weight (weight x rating = score)	Vendor A	Vendor B	Vendor C
Price							
Service							
Customer Reviews							
Total Uptime							
Vendor Stability							
<i>Sub-Totals</i>							
<i>Totals</i>							

KEY

Rating:

- 1= Poor
- 2= Fair
- 3= Average
- 4= Good
- 5= Excellent

Weight:

- 1= Unimportant
- 2= Low Priority
- 3= Medium Priority
- 4= High Priority
- 5= Critical/Highest Priority

Evaluation Criteria Definitions:

- **Price** = Total cost of hosting
- **Service** = Service guarantees, including reported response times and service-level agreements (SLAs)
- **Customer Reviews** = Results of Internet search of search engines and news archives to look for negative customer comments related to all Vendors in the table
- **Total Uptime** = Total expected uptime based on service-level agreements and contract terms.
- **Vendor Stability** = Overall solvency of vendor/company, based on review of publicly-available information and analysis of comparable service providers and general market conditions.

Vendor A=

Vendor B=

Vendor C=

9. COMMUNICATIONS MANAGEMENT PLAN

This section defines:

- What project stakeholders require what information
- How and when that information will be communicated to them.

Note that this section focuses on formal communications and is intended to ensure that the main communications needs of key project stakeholders are identified and satisfied. Informal communications regarding project issues are expected and welcome to take place between those involved in the project at Company Name and the project manager assigned to this project. The name and contact information for individuals assigned to these positions is provided in the following section, Project Team Directory.

An additional relevant communication requirement is provided in Section 5.2.3, Change Control Management. This section defines the specific communication(s) that must occur when a change request has been made.

9.1 STAKEHOLDER ANALYSIS

The table below shows the key stakeholders identified for this project, and their information needs. This table should be refined or changed based on discussions with the stakeholders noted.

STAKEHOLDER ROLE	STAKEHOLDER NAME & TITLE	PROJECT INFORMATION REQUIRED
Project Sponsor		<ol style="list-style-type: none"> 1. Project state reports (progress, status, and forecast) 2. Quality Control Reports specified in Section 7.2.2
Project Director		<ol style="list-style-type: none"> 1. Project state reports (progress, status, and forecast) 2. Quality Control Reports specified in Section 7.2.2
Project Team		<ol style="list-style-type: none"> 1. Individual performance feedback (generated by analysis of project state reports) 2. Individual Quality Control information (identified issues or trends for team member to address)
Project Account Manager		<ol style="list-style-type: none"> 1. Project state reports (progress, status, and forecast) 2. Signed (authorized) Change Control Request Forms

This table shows when and how each noted project stakeholder will receive the information identified above.

STAKEHOLDER NAME & TITLE	INFORMATION DISTRIBUTION SCHEDULE	COMMUNICATION MEDIUM/MEDIA
Project Sponsor	Weekly (once per business week)	
Project Director	Weekly	
Project Team	Daily, as necessary (minimum Weekly)	
Project Account Manager	Weekly	

10. PROJECT TEAM DIRECTORY

This section lists the key stakeholders for this project through or with whom informal and formal communication is authorized, and their contact information. Note that contact information is NOT provided for all project team members, since such communication can negatively impact employee productivity and impede overall project progress and execution.

All project-related communication should be channeled through the Our Company Project Manager for this project. All communications regarding billing issues should be directed to the Our Company Account Manager for this project.

STAKEHOLDER TITLE/ PROJECT ROLE & NAME	E-MAIL ADDRESS	TELEPHONE
Project Manager		
Account Manager		
Project Sponsor		
Project Director		