Project

Plan

Summary

[Insert Project Name]

|  |  |
| --- | --- |
| Project ID: | [Enter Project Number] |
| Prepared By: | [Enter Preparer’s Name] |
| Position: | [Enter Preparer’s Position] |
| Company: | [Enter Company Name] |
| Date: | [DD MMM YYYY] |

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# Project Overview

## Background

[Insert Background. This document is meant to augment and expand on the information provided in the Project Charter to clearly define the requirements for the project or phase of the project in sufficient detail to be able to make future decisions and to clarify expectations. The level of detail in this document should be sufficient to eliminate confusion between stakeholders and to be able to make future project decisions.]

## Need/Requirement

[Explain the problem or opportunity that creates the need for the project. This section can be copied from the charter, but any additional requirements that have been identified during the planning processes can be included here.]

## Objectives

[Insert detailed Project Objectives elaborated from the broad objectives stated in the project charter.]

# Project Scope

## Deliverables

[Summarize the deliverables from the scope statement to provide the reader with sufficient information to understand what is being produced by the project. This should not include detailed specifications; instead, refer the reader to the detailed scope documents with their location.]

### Deliverable 1: [Insert Deliverable Name]

#### Description

[Copy from Scope Statement]

#### Acceptance Criteria

[Copy from Scope Statement]

### Deliverable 2: [Insert Deliverable Name]

#### Description

[Copy from Scope Statement]

#### Acceptance Criteria

[Copy from Scope Statement]

[Continue with any other deliverables]

## Scope Exclusions

[Insert specific deliverables or work which could reasonably be considered part of the project but which are specifically out of scope for the project. Explain why each exclusion is outside the scope of this project.]

The following deliverables and tasks are excluded from the project:

| Excluded from project: | Reason: |
| --- | --- |
|  |  |
|  |  |

## Updated Detailed Assumptions

[Insert assumptions in as much detail as necessary and explain how each assumption will be validated. The purpose of documenting assumptions is to communicate and to validate or invalidate them. It is important to note that assumptions must be validated and not used as justification for non-performance.]

| It is assumed that: | This will be validated by: |
| --- | --- |
|  |  |
|  |  |

## Constraints

[Insert constraints identified in as much detail as necessary, including explanations defining why each constraint has been imposed on the project.]

The following restrictions apply to the project:

| Constraint imposed on project: | Reason: |
| --- | --- |
|  |  |
|  |  |

## 

## Project Approach/Phases

[Describe the approach to completion of the project and the phases in the “product” lifecycle with a brief narrative description of the work and deliverables from each phase.]

## High Level Tasks:

[Insert high-level (summary) tasks from the WBS and include a reference to the WBS file for further information. Consider including amount of work (effort) required for each summary task.]

|  |  |
| --- | --- |
| Phase or Summary Task | Work |
|  |  |
|  |  |
|  |  |

# Project Resources

[Summarize personnel, material, and equipment resource requirements to complete project tasks and refer to the resource responsibility matrix, resource sheet, and resource usage as necessary.]

## Key Personnel Responsibilities

The following resources will be required to complete this project:

|  |  |  |
| --- | --- | --- |
| Name | Role | Responsibilities |
|  | Client | Responsible for defining the need for the project. |
|  | Sponsor | Responsible for authorizing the project, defining the project objective, and approving the plan and any changes. |
|  | Project Manager | Responsible for successful achievement of the project objectives. |
|  |  |  |
|  |  |  |

## Labour

|  |  |
| --- | --- |
| Personnel | Work |
|  |  |
|  |  |
|  |  |

## Equipment

|  |  |
| --- | --- |
| Equipment | Work |
|  |  |
|  |  |
|  |  |

## Material

|  |  |
| --- | --- |
| Material | Amount |
|  |  |
|  |  |
|  |  |

[If necessary, insert a Responsibility Assignment Matrix]

# Project Schedule

## Schedule

The project started on [Baseline Start Date]. It is expected to take [Overall Duration stated in months] to complete on [Baseline Finish Date].

[Insert summary baseline Gantt chart. Copy the summary task list, duration, baseline start dates, and baseline finish dates into the table below.]

|  |  |  |  |
| --- | --- | --- | --- |
| Summary Task | Duration | Start Date | Finish Date |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Key Project Milestones

[Sort milestones chronologically (by Start Date). Insert milestone timeline or Baseline Gantt chart grouped for milestones. Copy the milestone list with baseline finish dates into the table below.]

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

# Project Budget

[Insert summary project budget (or pricing if this is an external document) for all resources (people, material, equipment, & infrastructure) broken down into appropriate sections for the readers of the plan.]

The total budget for this project is [Total]. This includes a [x%] contingency reserve amount and only reflects the [direct/burdened/loaded] costs associated with this project. [This budget specifically does not include the overhead costs associated with labour or materials. – if only direct costs]

## Task Expense Summary

The following is a breakdown of the estimated costs by project phase including labour and material costs and contingency reserves:

[Replace this table if using spreadsheet software]

|  |  |
| --- | --- |
| Summary Task | Cost |
|  |  |
|  |  |
| Sub-total |  |
| Contingency (10%) |  |
| TOTAL |  |

[Insert a bar chart of task cost distribution.]

## Resource Expense Summary

The following table and chart represent the project baseline costs by resource type:

[Replace this table if using spreadsheet software]

|  |  |
| --- | --- |
| Resource Group | Cost |
|  |  |
|  |  |
| Sub-total |  |
| Contingency (10%) |  |
| TOTAL |  |

[Insert a bar chart of resource cost distribution.]

## 

## Project Cash Flow Summary

The following table and chart represents the project expenses over time.

[Replace this table using monthly or quarterly scale if using spreadsheet software]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Summary Task | Q1 | Q2 | Q3 | Q4 |
|  |  |  |  |  |
|  |  |  |  |  |
| Sub-total |  |  |  |  |
| Cumulative cost |  |  |  |  |
| Total Cost with Contingency |  |  |  |  |

[Insert cumulative cost curve chart of weekly cash flow]

# 

# Project Risk Management

## Risk Planning Process

[Include a brief description of the approach to risk management on the project. Summarize project risks based on the risk register. Prioritize the risks by exposure or immediacy and refer to the detailed risk register as necessary.]

This project followed a systematic, proactive approach to risk planning, which involved as many stakeholders as feasible. The processes for risk planning was:

1. Risk identification – identified possible risk events that could occur on the project, the triggers that could precipitate the risk, and the symptoms that would indicate that the risk occurred.
2. Risk qualification – determined the qualitative probability and impact of the risks, based on stakeholders’ input, to prioritize the risks for further planning actions.
3. Risk quantification – high score risks were analysed further to quantify their probability in percentage and their impacts in cost, time or quality measures. The result of quantification is the risk exposure, which is the product of the probability and impact values.
4. Risk response development – proactive risk response strategies were developed reduce, transfer or eliminate unfavourable risks and exploit, enhance or share favourable risks. Some risks had contingency plans and fallback plans developed in case the risks occur.

## Risk Register

The following table represents only the highest exposure risks on this project.

| Risk Event | Exposure | Response Strategy | Responsibility |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |

# Communication Plan

[Insert the plan for managing communications with the client and project team including processes, standards, responsibilities, contact info, organization, etc.; and refer to detailed communication plan as necessary.]

## Project Manager Communications Responsibilities

The project manager will manage all project communications, including any internal and external communications. The project manager will provide templates for reports to the appropriate project team members to report their progress.

The project manager will also provide task assignment lists to each of the resources with the upcoming tasks assigned to each resource.

The project manager will communicate any critical changes and risks impacting project scope, cost, and schedule, to the project sponsor. The project manager will meet the project sponsor monthly, or as needed. The project manager will communicate to the sponsor via monthly progress reports and variance reports.

The project sponsor and the project manager will communicate any changes requiring approval and any impacts related to changes to the Steering Committee. The sponsor will also communicate project status to the committee via quarterly reports presenting progress, variance, trends and forecast as required.

## Project Team Communications Responsibilities

The project team will ensure the project status is reported to the project manager on a weekly basis, or immediately for critical issues. The project team will be critical in assisting the project manager with the development, maintenance, and final closing of the Communications Management Plan. They will be responsible for providing the project manager input towards the Communications Management Plan.

Each project team member will be responsible for communicating the status of his or her assigned tasks within the project on a weekly basis. Each team member will be assigned tasks from the project schedule depending on their expertise from the project manager. Any issues or requests must be communicated to the project manager as soon as possible.

Teams will meet bi-weekly with project manager and/or project sponsor (as appropriate) and present information related to assigned tasks and present any new related identified tasks.

The Team members will communicate via their weekly status reports, and verbally during status meetings any issues that may impact project cost, schedule, scope, and/or quality.

## Reporting

The following table outlines the reports to be generated and distributed throughout this project:

|  |  |  |  |
| --- | --- | --- | --- |
| Report Type | Timing | Recipients | Responsible |
| Periodic Task Progress Reports | Bi-weekly | Project Manager | Team, Sub-contractors |
| Project Performance Reports | Monthly | Management | Project Manager |
| Upcoming Activity Report | Weekly | Team, Sub-contractors | Project Manager |
| Project Closeout Report | On Close | Management | Project Manager |
| Lessons Learned Report | On Close | All Stakeholders | Project Manager |

## Meetings

The following table outlines the meetings to be held throughout this project:

| Meeting Type | Timing | Participants |
| --- | --- | --- |
| Initiating/Planning meetings | As necessary | Project Manager, Team |
| Project Kick-off meeting | Execution Start | Stakeholders |
| Project Progress meetings | Bi-weekly  As necessary | Project Manager, Team |
| Project Status meetings | Monthly | Sponsor, Project Manager |
| Closeout meetings | On Phase close  On Project close | Stakeholders |

## Key Contact Information

The following table outlines the key contacts on this project:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Contact | Role | E-mail | Telephone | Urgent |
|  | Client |  |  |  |
|  | Sponsor |  |  |  |
|  | Project Manager |  |  |  |
|  | Team Lead |  |  |  |
|  | Team Member |  |  |  |
|  | Team Member |  |  |  |
|  | Team Member |  |  |  |

# Change Control

## Process

The following process will be used to manage change and change requests/orders:

1. Any potential change that impacts the project’s scope, schedule, cost, or resulting deliverables will be documented on a Change Control Form.
2. The change Initiator or Discoverer prepares the Change Control Form and documents the impact the change will have on the project.
3. The Project Manager and Sponsor review the Change Control Form and decide if the change is in or out of the agreed project scope. The Sponsor determines if the scope revision should be approved and seeks additional funding if required.
4. Approved changes will be grouped into a formal Contract Amendment as needed.
5. Once accepted, the Project Manager will revise the project plan baseline to reflect the accepted change. Any deliverable content that is expected to change will be documented in the Change Control Form. The contents of the Change Control Form (and any related documentation) will signify an official amendment to the relevant sections of the plan or charter.

# Project Plan Approval

The following signature indicates approval of the information, terms and conditions, and specifications presented in this document and all supporting documents. This document is supplemental to the contract and will be considered part of the agreement between the parties. Any amendments to the services provided under this project plan must be documented and accepted by both parties using change control.

|  |  |  |
| --- | --- | --- |
|  |  |  |
| Project Sponsor |  | Date |
| Position |  |  |