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Template Guide

What is a Project Plan?

The Project Plan is the central document by which the project is formally managed. A Project Plan is a document which lists the activities, tasks and resources required to complete the project and realise the business benefits outlined in the Project Business Case. A typical Project Plan includes:

- *A description of the major phases undertaken to complete the project.*
- *A schedule of the activities, tasks, durations, dependencies, resources, and timeframes*
- *A listing of the assumptions and constraints identified during the planning process.*

To create a Project Plan, the following steps are undertaken:

- *Reiterate the project scope.*
- *Identify the project milestones, phases, activities and tasks.*
- *Quantify the effort required for each task.*
- *Allocate project resource.*
- *Construct a project schedule.*
- *List any planning dependencies, assumptions, constraints.*
- *Document the formal Project Plan for approval.*

When to use a Project Plan

Although a summarised Project Plan is identified early in the Project Start-up Phase (within the Business Case), a detailed Project Plan is not usually created until the project scope has been formally defined (within a Project Charter) and the project team appointed. The Project Plan is completed early in the Project Planning Phase and is, typically, prior to a Quality Plan and the formalisation of a Supplier's contract. Unlike other documents in the Project Lifecycle, the Project Plan is referenced constantly throughout the project. As the project is undertaken, the Project Manager tracks the percentage of task completion and the task completion date (actual vs planned) to assess overall project performance. These statistics are communicated to the Project Sponsor/Board within a regular Project Status Report.

How to use this template

This document provides a guide on the topics usually included in a Project Plan. Sections may be added, removed or redefined at your leisure to meet your particular business circumstance. Example tables, diagrams and charts have been added (where suitable) to provide further guidance on how to complete each relevant section.

1 Planning Basis

1.1 Scope

The activities and tasks defined in the project plan must be undertaken within the scope of the project. For this reason, reiterate the scope of the project here as defined in the *Project Charter*.

1.2 Milestones

A *milestone* is “a major event in the project” and represents the completion of a set of activities. Examples of milestones include:

- Business Case approved.
- Feasibility Study approved.
- Project Charter approved.
- Project Team appointed.
- Project Office established.

List and describe the key project milestones within the following table:

Milestone	Description	Delivery Date
Business Case Approved.	The Business Case has been documented and was approved by the Project Sponsor.	xx/yy/zz

1.3 Phases

A *phase* is “a set of activities which will be undertaken to deliver a substantial portion of the overall project”. Examples include:

- Project Initiation
- Project Planning
- Project Execution
- Project Closure.

List and describe the major project phases within the following table.

Phase	Description	Sequence
Project Initiation	Defining the project by developing a business case, feasibility study and Project Charter as well as recruiting the project team and establishing the project office.	Phase # 1

1.4 Tasks

A *task* is simply an item of work to be completed within the project. List all tasks required to undertake each activity, within the following table:

2.2 Dependencies

'Dependencies' are logical relationships between phases, activities or tasks which influence the way that the project must be undertaken. Dependencies may be either internal to the project (e.g. between project activities) or external to the project (e.g. a dependency between a project activity and a business activity). There are four types of dependencies:

1. Finish-to-start (*the item this activity depends on must finish before this activity can start*)
2. Finish-to-finish (*the item this activity depends on must finish before this activity can finish*)
3. Start-to-start (*the item this activity depends on must start before this activity can start*)
4. Start-to-finish (*the item this activity depends on must start before this activity can finish*).

List any key project dependencies identified by completing the following table:

Activity	Depends on	Dependency Type
Set-up Project Office	Appoint Project Team	Finish-to-start

In the example given above, the activity "Appoint Project Team" must finish before activity "Set-up Project Office" can start.

2.3 Assumptions

List any planning assumptions made. For example:

It is assumed that:

- The project will not change in scope.
- The resources identified will be available upon request.
- Approved funding will be available upon request.

2.4 Constraints

List any planning constraints identified. For example:

- The project must operate within the funding and resource allocations approved.
- The project team must deliver the software with no requirement for additional hardware.
- Staff must complete the project within normal working hours.

3 Budget, Risks and Change Management

3.1 Project Budget

List the task and how much the labor and materials necessary to execute it will cost. Then add your budget to the appropriate column and the actual spend to the next column in order to track planned costs against actual costs.

WBS	Task	Labor	Materials	Budget	Actual
1	Blueprints	\$100	\$200	\$300	\$250

3.2 Risk Log

Identify risks to the project and list them here. Include the impact, response, level of risk and who on the team will own the response if the issue in fact arises.

ID	Risk	Impact	Response	Risk Level	Risk Owner
1	Supply delay	Schedule	Backup Supplier	High	Daniel Johnson

3.3 Change Management

When a change request is made, use this log to track its impact, response and whether the change control board has approved it or not.

Date Identified	Request	Impact	Approval	Date Started	Date Completed
1/2/2024	Add spackle	Schedule	Yes	1/20/2024	1/30/2024

AGILE
ADMIRAL