



Project Plan Template

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Template Guide

What is a Project Plan?

A Project Plan is the primary document used to formally manage a project. It outlines the activities, tasks, and resources necessary to complete the project and achieve the business benefits defined in the Project Business Case. A standard Project Plan typically includes:

- *An overview of the major phases needed to complete the project.*
- *A schedule detailing the activities, tasks, durations, dependencies, resources, and timeframes.*
- *A list of assumptions and constraints identified during the planning process.*

Steps to Create a Project Plan

To create an effective Project Plan, follow these steps:

1. **Reiterate the Project Scope:** *Clarify the project scope to ensure everyone is on the same page.*
2. **Identify Milestones, Phases, Activities, and Tasks:** *Break down the project into manageable components.*
3. **Quantify Effort for Each Task:** *Estimate the amount of work required for each task.*

4. **Allocate Resources:** Assign resources to each task based on availability and skill sets.
5. **Construct a Schedule:** Develop a detailed project schedule outlining timelines and dependencies.
6. **List Dependencies, Assumptions, and Constraints:** Identify any factors that may affect the project.
7. **Document the Plan:** Compile all information into a formal Project Plan document for approval.

When to Use a Project Plan

A summarized Project Plan is typically outlined during the Project Start-up Phase within the Business Case. However, a detailed Project Plan is usually developed after the project scope has been formally defined in a Project Charter and the project team has been appointed. This detailed plan is completed early in the Project Planning Phase, usually before the creation of a Quality Plan and the formalization of any supplier contracts. The Project Plan is a living document referenced throughout the project. The Project Manager regularly tracks task completion percentages and dates (actual vs. planned) to monitor overall project performance. These metrics are communicated to the Project Sponsor or Board through regular Project Status Reports.

How to Use This Template

This document serves as a guide on the typical sections included in a Project Plan. You can add, remove, or modify sections as needed to suit your specific business needs. Example tables, diagrams, and charts are included where appropriate to provide further guidance on completing each 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
		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

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:

Phase	Activity	Task	Sequence

1.5 Effort

For each task listed above, quantify the likely 'effort' required to complete the task.

Task	Effort

1.6 Resources

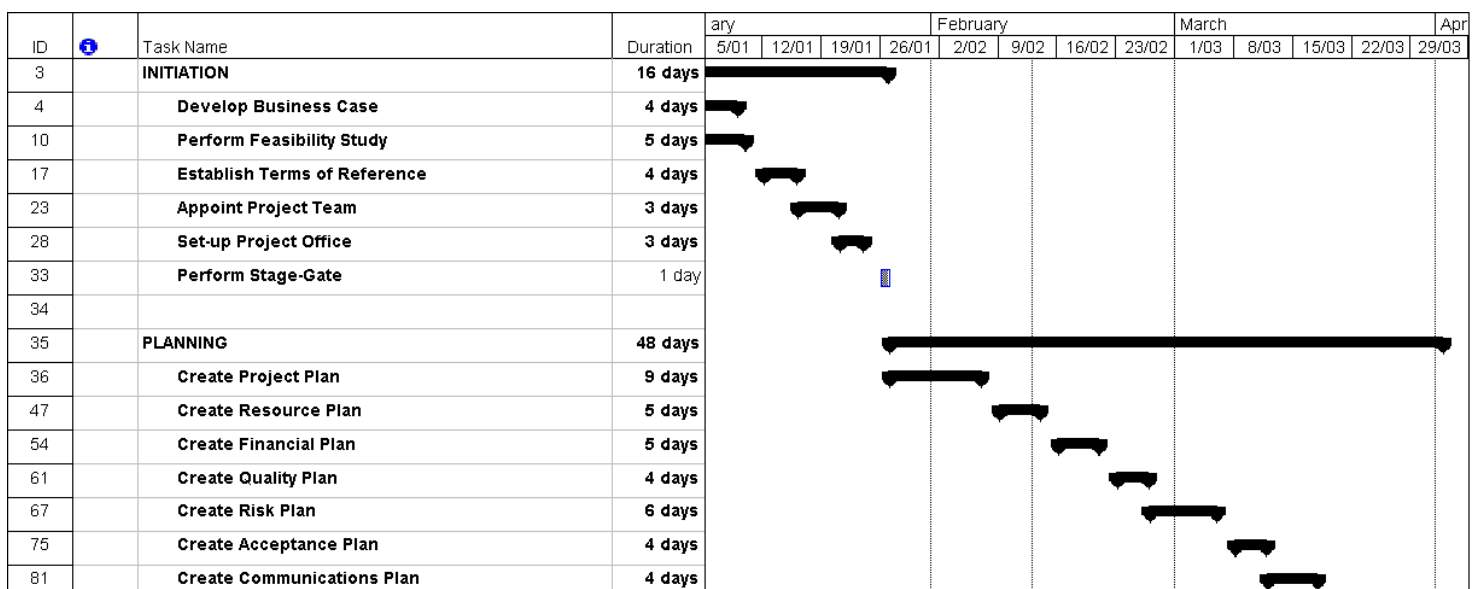
For each task identified, list the resources allocated to complete the task.

Task	Resource

2 Project Plan

2.1 Schedule

Provide a summarised schedule for each of the phases and activities within the project.



Note: Refer to the Appendix for a detailed project schedule.

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

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

4 Appendix

Attach any documentation you believe is relevant to the Project Plan. For example:

- Detailed Project Schedule (listing all project phases, activities and tasks)
- Other documentation (Business Case, Feasibility Study, Project Charter)
- Other relevant information or correspondence.

FAQ: Project Plan Template

Q1: What is a Project Plan Template?

A: A Project Plan Template is a pre-designed document that outlines the key elements of a project, including objectives, timelines, tasks, resources, and stakeholders. It serves as a guide to ensure that all aspects of the project are considered and planned for effectively.

Q2: What are the key components of the Project Plan Template?

A: The key components typically include:

- Project Overview
- Objectives and Goals
- Scope Statement
- Deliverables
- Project Schedule
- Resource Allocation
- Risk Management Plan
- Communication Plan
- Stakeholder Analysis
- Budget and Financial Plan

Q3: How do I customize the Project Plan Template for my project?

A: To customize the template, start by filling in the basic project information such as project name, description, and key stakeholders. Then, tailor each section to fit the specific needs of your project, including setting realistic timelines, identifying key milestones, and assigning tasks to team members.

Q4: Can I use the Project Plan Template for different types of projects?

A: Yes, the Project Plan Template is versatile and can be adapted for various types of projects, including IT, construction, marketing, and more. Adjust the content to match the specific requirements and goals of your project.

Q5: How often should I update the Project Plan?

A: The Project Plan should be a living document, updated regularly throughout the project lifecycle. Updates should be made whenever there are changes in project scope, timelines, resources, or any other significant factors.

Q6: Why is a Project Plan Template important for project success?

A: A Project Plan Template helps ensure that all critical aspects of the project are considered and planned for, reducing the risk of oversight and enhancing project organization. It facilitates clear communication among team members and stakeholders, helping to keep the project on track and within budget.

Q7: Where can I find a reliable Project Plan Template?

A: Reliable Project Plan Templates can be found online on project management websites, software tools, and professional organizations. Many project management software solutions also offer built-in templates that can be customized to your needs.

Q8: Do I need any special software to use the Project Plan Template?

A: Most Project Plan Templates are available in common formats like Word, Excel, or PDF and can be used with standard office software. For more advanced features, project management software like Microsoft Project, Trello, or Asana may be helpful.

Q9: How can I ensure that my project stays aligned with the Project Plan?

A: Regularly review the Project Plan with your team, track progress against the plan, and adjust as necessary. Use project management tools to monitor tasks, deadlines, and resources, and maintain open communication with all stakeholders.

Q10: Can I get support if I have questions about the Project Plan Template?

A: Yes, support is often available from the provider of the template. This can include online resources, tutorials, and customer service. For templates from project management software, in-app support and community forums can also be helpful.