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Project Plan for <project name>

Distribution:

<Organization., Name>

Appendices:

<Appendix 1>

Help: The purpose of the Project Plan is to document all managerial aspects of a project that are required to execute it successfully within its constraints. If some aspects are defined in separate plans (e.g. Quality Assurance Plan, Configuration Management Plan, Risk Management Plan, Project Schedule), the Project Plan should refer to these documents.

It is important, that also non-applicability of a section is agreed on by the responsible manager. Therefore:

- *Don't remove headlines level 1 and level 2 headlines (Heading1 and Heading2)*
- *Reasons why a section is not applicable shall be documented under the respective headline*

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1. Overview

Help: This section describes a management summary. Provide essential information like

- What the motivation for this project is (e.g. to fill a gap in the product portfolio)
- Who the customer is
- What the project will deliver. Is it a new product or an extension of an existing one?
- What it will cost
- How long it will take
- Which organizations are involved
- Which other projects depend on the project result
- Which other projects contribute with their results

Refer to the Project Proposal [1] or other documents (e.g. Feasibility Study Report) containing information on the project background like market, technology, profitability, and competitor evaluation.

2. Goals and Scope

2.1 Project Goals

Help: The project goals define the expected project results together with the required development constraints. Information may be extracted from the Project Proposal [1] (or the Feasibility Study Report) and the Project Requirements Specification and completed, if required.

Identify the various categories of project goals (list the major project goals only and refer to the Project Requirements Specification or other documents for details).

Consider the following categories:

- Functional goals
- Strategic goals
- Business goals (e.g.: time-to-market, cost)
- Technological goals
- Quality goals
- Organizational goals (e.g. competence development, testing of new methods, techniques, or tools, application of new processes, etc.)
- Other goals, e.g.: usability, portability, etc. (these goals, and what is specifically expected, should be clearly specified in the Project Requirements Specification)
- Constraints (e.g.: environmental constraints, application specific standards, national standards, cultural relationships, etc.)

Prioritize the project goals:

Functional, business, and quality goals should be prioritized at least.

Project Goal	Priority	Comment/Description/Reference
Functional Goals:	2	For details see the Project Requirements Specification [2]
<functional goal #1>		
<functional goal #2>		
Business Goals:		
<Time-to-market>		
<efficiency, cost, quality>		
Technological Goals:		
<technical goal #1>		

Project Goal	Priority	Comment/Description/Reference
Quality Goals:	2	
<quality goal #1>		
Constraints:		
<environmental>		
<appl. specific standards>		
<national standards>		

2.2 Project Scope

Help: Clarify what the project will (and will not) deliver, in order to avoid future shifts in the level of ambition.

2.2.1 Included

The deliverables of this project and their receivers are listed in detail in the delivery plan in chapter 10.

2.2.2 Excluded

Help: State what is specifically excluded from the project but what the customer may expect to be included. This could, for example, be clarifying that training of end-users is excluded.

This project will exclude ...

3. Organization

Help: Describe the internal project organization and all organizational issues affected by the project result or the project is dependent on. You may extract information from the Project Proposal [1] (or Feasibility Study Report).

3.1 Organizational Boundaries and Interfaces

Help: Describe the environment that the project is embedded in. Identify external **stakeholders** the project is dependent on and who are affected by the project result. Describe the administrative and managerial boundaries between the project and each of the following entities: the parent organization, the customer organization, subcontracted organizations, and any other organizational entities that interact with the project.

3.1.3 Resource Owners

Resource Owners are defined in the Resource Plan in section 5.1.

3.1.4 Receivers

Receivers are defined in the Delivery Plan in section 10.

3.1.5 Sub-contractors

Help: A **Sub-contractor** is an external organization that is contracted to provide the project with a specified product, knowledge or service.

Sub-contractors are defined in the sub-contract management in section 8.

3.1.6 Suppliers

Help: A **Supplier** is an external organization contributing to the project with an existing product (COTS = Commercial Off The Shelf) that is incorporated into a project deliverable (e.g. a database system) or used for project support (e.g. tool, equipment).

Identify all external suppliers and their deliverables. State any special arrangements or procedures that will be used in contacts with the suppliers. Name contacts, if applicable.

Company: Contact	Deliverable	Comment

3.1.7 Cross Functions

Help: Identify all functions within the organization that are involved in/contribute to the project.

Function	Dept.: Contact	Responsibility/Comment
Product Mgmt		
Marketing		
Sales		
Service		
Training		
Manufacturing		
Quality		
Technology		
Supply Mgmt		

3.1.8 Other Projects

Help: Specify the interface to other projects. Identify the relevant dependencies in terms of deliveries to or from the project, and usage of the same resources.

Project	Org.: Project Mgr	Dependency	Comment

3.2 Project Organization

Help: Describe how the project is organized. Describe what subprojects and other areas of responsibility are planned. Identify and staff all steering functions, project management functions, and execution functions.

Graphical illustrations such as hierarchical organization charts or matrix diagrams may be used to depict the lines of authority, responsibility, and communication within the project.

3.2.1 Project Manager

Help: Identify the Project Manager who has the overall responsibility of the project. If the Project Manager has appointed a Technical Project Manager (syn.: Development Project Manager), who is only responsible for the technical project execution, this should also be specified.

Example:

Role	Organization: Name
Project Manager	
Technical Project Mgr.	

3.2.2 Project-internal Functions

Help: Since the project manager has the overall project responsibility, he /she is also responsible for the project-internal functions. But he/she can delegate the management of these functions to project team members. In this case list the functions and individuals responsible for

Example:

Function	Organization: Name	Comment
Quality Assurance		
System Test Lead		
Validation Lead		
Configuration Mgmt		
Change Mgmt		
etc.		

3.2.3 Project Team

Help: List all project team members here and ensure that the time they spend on the project is accounted for in the project budget.

Organization: Name	Availability	Comment

3.2.4 Steering Committee

Help: Identify the committed individuals composing the project steering committee, and its responsibility and authority within the project.

The Steering Committee (SteCo) of the project is responsible for

The SteCo consists of the following members:

Organization	Name	Comment

4. Schedule and Budget

4.1 Work Breakdown Structure

Help: Based on project goals and scope, define a Work Breakdown Structure. Define work packages and project activities. It is normally a separate document, therefore list it in References and refer to it.

The Work Breakdown Structure (WBS) is documented in [6].

4.2 Schedule and Milestones

Help: Estimate the effort for the project activities and plan the activity sequencing. Then prepare the schedule that supports all of the required activities and complies with the resource plan.

Define project milestones based on the chosen development strategy (see section 6) and on critical events in the project schedule.

List the milestones and define clear milestone criteria to make milestones measurable.

Milestones	Description	Milestone Criteria	Planned Date
M0	Start Project	Budget Release	<yyyy-mm-dd>
	e.g.: Project goals and scope defined	PRS or SRS reviewed Stakeholders identified Impl. Proposal reviewed	<yyyy-mm-dd>
M1	Start Planning		<yyyy-mm-dd>
	<milestone description, e.g. Life Cycle Objectives LCO defined>	Scope and concept described	<yyyy-mm-dd>
M2	Start Execution		<yyyy-mm-dd>
	<milestone description, e.g. Life Cycle Architecture LCA defined>	Requirements agreed, project plan reviewed, resources committed	<yyyy-mm-dd>
M3	Confirm Execution		<yyyy-mm-dd>
	<milestone description, e.g. alpa version>	Architecture reviewed and stable	<yyyy-mm-dd>
M4	Start Introduction		<yyyy-mm-dd>

Milestones	Description	Milestone Criteria	Planned Date
	<milestone description, e.g. system test passed>	Coding of new functionality finished, Draft documentation	<yyyy-mm-dd>
M5	Release Product		<yyyy-mm-dd>
	<milestone description>	Product system tested, documentation reviewed	<yyyy-mm-dd>
M6	Close Project		<yyyy-mm-dd>

A detailed Project Schedule is available in [4]. The Project Schedule is monthly updated by the Project Manager.

4.3 Budget

Help: Calculate the required project budget based on cost estimates for project activities, sub-contracts, COTS (Commercial Off The Shelf), training, etc. Present the distribution of the budget over the whole project life.

Category	Budget for Period in kUS\$					
	M0- M1	M1- M2	M2- M3	M3- M4	M4- M5	M5- M6
Human Resources (internal)						
Human Resources (external)						
Purchases (COTS)						
Equipment						
Premises						
Tools						
Travel costs						
Training						
Review activities						
Other						
Total	1	1	2	5	2	1
Total cumulated	1	2	4	9	11	12

For a detailed list of costs of all resources see <document> [x].

Help: Prepare a resource plan specifying the project's need for human resources, as well as for other resources (equipment, tools, licenses, etc.).

4.4 Development Process

Help: If available and applicable refer to the **organizational development process** and describe deviations from this standard process. Otherwise describe the development process applied in this project.

Explain why this development process has been selected. Describe how the selected development process is tailored to the needs of the project, takes learnings from previous projects into account, and how it is mapped to the milestone process.

4.5 Development Environment

Help: Define methods, tools, languages, etc. to be employed for design, implementation, test, and documentation, and when they (or knowledge) should be available.

Example:

Item	Applied for	Availability by
Methods		
Use Case	Requirements capturing	M0
Tools		
Rational Rose	Design	M2
Languages		
UML	Design	M2
Java	Web interface	M2
C++	...	M2

4.6 Measurements Program

Help: If available refer to the **organizational measurements program** and document deviations from this program. Otherwise define which project specific data should be collected, e.g. to assess the achievement of the project goals.

Examples:

Type of data	Purpose	Responsible
<# changed requirements>		Q-Responsible
<# defects found before M4>		Q-Responsible
<performance data>	to assess the achievement of project requirements	Test lead

5. Risk Management

Help: Describe the procedure to be used for managing risks in the project. The procedure should specify who is responsible for risk management, when risk situation is regularly considered (e.g. at each project status meeting), and which roles risks are communicated to, etc.

Also refer to the Risk Management Plan (or Risk Sheet) where the risks are listed, assessed, and mitigation and contingency is defined.

Example:

All identified risks are documented, assessed and prioritized in the Risk Management Plan [5] by the Project manager. The plan also defines the mitigation and contingency measures and who is responsible for. The Risk Management Plan is updated monthly

or on event and communicated to all affected stakeholders by the Project Manager.
 The risk status is reported to the line management in the monthly Project Report.

6. Sub-contract Management

Help: List which part of work is out-sourced to which sub-contractor.
 Refer to the sub-contractor's agreement that should include or refer to the statement of work, the execution process, milestones, quality assurance, configuration management, communication structure, hand-over procedure, acceptance criteria, and quality audits.

Company	Sub-contractor		Sub-contracted Work	Ref. to sub-contract
		Contact		

7. Communication and Reporting

Help: State the principles for reporting and distributing information within the project for the different groups of internal and external stakeholders. Include, for example, how often the reporting will take place, the type of reports or information, the type of media in which it is presented, and the type of meetings that will take place.

- a) *Internal communication and reporting: ensure that all information is available to those who need it.*
 - Plan project meetings, how often they take place, and who will participate
 - Define how project information will be made available to the internal stakeholders (e.g. project library)
 - Define how and how often sub-projects and sub-contractors report to the project manager
 - Define who participates milestone meetings
 - Define how events will be communicated
- b) *External communication and reporting:*
 - Define what information will be provided to which stakeholders
 - Define how and how often information will be provided to which stakeholders often (e.g. project report)
 - Plan regular meetings with external stakeholders (e.g. SteCo meetings)

Example:

Type of Communication	Method / Tool	Frequency /Schedule	Information	Participants / Responsibles
Internal Communication:				
Project Meetings	Teleconference	Weekly and on event	Project status, problems, risks, changed requirements	Project Mgr Project Team
Sharing of project data	Shared Project Server	When available	All project documentation and reports	Project Mgr(s) Project Team Members
Milestone Meetings	Teleconference	Before milestones	Project status (progress)	Project Mgr Sub-project Mgr
Final Project Meeting	Teleconference	M6	Wrap-up Experiences	Project Mgr Project Team

Type of Communication	Method / Tool	Frequency /Schedule	Information	Participants / Responsibles
External Communication and Reporting:				
Project Report	Excel sheet	Monthly	Project status - progress - forecast - risks	Project Manager Sub-Project Managers
SteCo Meetings	Teleconference	Monthly		Project Manager, SteCo

8. Delivery Plan

8.1 Deliverables and Receivers

Help: List here all deliverables from the project and who the receivers of the deliverables are. Indicate also the planned delivery date. Take in consideration both strategic and technical aspects.

Examples for non-technical deliverables are: marketing and sales material, training material, management presentations, publications, bullets, etc.

Ident.	Deliverable	Planned Date	Receiver
D1			
D2			

Etc.	
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9. Quality Assurance

10. Configuration and Change Management

11. Security Aspects

Help: State how to deal with security matters, for instance:

- Classification of the project information with regard to requirements for integrity, availability and confidentiality, in accordance with the organization's group directives on security,
- Specific action that must be taken to fulfill security requirements, such as security agreements with suppliers and partners, security check of project team members, security audits of equipment, usage of coded information, etc.
- Authorization of information distribution and publishing, that is, who should decide which information will be distributed to whom,
- Procedure for monitoring security,
- Procedure for reporting security incidents.

12. Abbreviations and Definitions

Help: List all abbreviations and definitions used within this document.

CCB	Change Control Board
CI	Configuration Item
CM	Configuration Management
COTS	Commercial Off The Shelf
CR	Change Request
CRM	Change Request Management
ID	Identification, Identifier
IP	Intellectual Property
QA	Quality Assurance
SteCo	Steering Committee
V&V	Verification and Validation

13. References

Help: List all other documents this document refers to.

[1]	<Doc. No.>	Project Proposal for <project name>
[2]	<Doc. No.>	Project Requirements Specification for <project name>
[3]	<Doc. No.>	Implementation Proposal for <project name>
[4]	<Doc. No.>	Project Schedule for <project name>
[5]	<Doc. No.>	Risk Management Plan for <project name>
[6]	<Doc. No.>	Work Breakdown Structure for <project name>
[7]	<Doc. No.>	Quality Assurance Plan (if it is a separate plan)
[8]	<Doc. No.>	Configuration Management Plan (if it is a separate plan)
[9]	<Doc. No.>	<Sub-contract #1>
[10]	<Doc. No.>	

14. Revision

Rev. ind.	Page (P) Chapt. (C)	Description	Date Dept./Init.
-	---	original version	