

## PROJECT MANAGEMENT PLAN CHECKLIST

The project management plan is a comprehensive document that defines each area of your project. The final document will contain all the required plans you need to manage, monitor and implement your project. Your plan must also describe the deliverables and benefits it brings to the organization.

The introduction to the plan provides a high-level framework and summary of the project objective. The remainder of the plan is made up of a series of plans that are applicable to each functional area.

*For example:*

- Project Team Management (Human Resources)
- Scope
- Schedule (Timeframe & Milestones)
- Budget
- Quality
- Risk
- Communications
- Contract & Supplier Management

In the case of smaller projects, this plan can serve as a self-contained planning document. However, in larger projects it makes more sense to create a series of subordinate plans for each functional area (scope, budget, schedule, risk, quality, human resources, etc).

Using the project plan as a parent plan that refers to these subordinate plans prevents it from becoming too lengthy and complex. The following outline provides a good foundation for a project management plan but you will need to use your own judgment about which sections to use and how much detail to go into.

## Project Management Plan Checklist

--

### MANAGEMENT SUMMARY

This section should explain the business background to the project, what the project hopes to achieve and what the intended outcome will look like. This information should already exist in the business case, project charter and the preliminary scope statement.

It is important that project objectives are stated in a clear and measurable way so that when the project is completed there can be no argument about whether or not it has achieved these stated objectives. Many projects 'fail' because the objectives are not measurable and the language used to describe them means different things to different stakeholders.

For example, the objective:

*'Resolve 75% of billing queries during first customer call'* - is clear and measurable,

whereas,

*'Improve how customer billing queries are handled'* - is not.

The objectives must be clear enough so that the project can be measured against them once completed. Most of this information should already exist in the business case, project charter and the preliminary scope statement.

The purpose of this plan should be to describe how and when a project's objectives are to be achieved, by showing the major products, milestones, activities and resources required on the project. It should also document project team roles and responsibilities, and the governance structure of the project.

These are the products and services that the project will deliver rather than the project management deliverables (other plans and documents), which are detailed below. This information should already exist in the business case, project charter and the preliminary scope statement.

### **HUMAN RESOURCES (HR) MANAGEMENT**

This section defines the people that make up the project team, both in terms of skills and knowledge. The composition of the whole project team will change over the length of the project as resources alter to match the project phase. But it is important to have core of individuals that are committed throughout the project and have the correct level of management, planning, organizing, monitoring and communications skills.

This section needs to consider the following:

**Developing the HR Plan** – is where you define the type of skills and knowledge you require for your project team members and represent this in a project organization chart. The project activities will provide you with a list of the necessary skills and level of responsibility you need for each phase or work package of the project. It will also identify if there are any training requirements and create a timetables of when, who and how long an individual will be released to the project time.

**Acquiring Project Team** – identifies the manner in which you will acquire the necessary individuals for the project in a timely fashion. Where specialist resources are required the project manager will negotiate the release of such individuals with their functional managers or liaise with agencies to provide people to interview in advance.

**Developing and Managing the Project Team**– this is the process where the project manger builds a competent team, one that is based on trust, open and honest communications. The project manager must create an environment that encourages a collaborative way to solve problems and make decisions. Conflicts and differences of opinion will occur throughout the project and it is essential that the project manager deals with these instance in a constructive and objective manner.

### COMMUNICATIONS MANAGEMENT

The need for good and appropriate communications between the project manager and project stakeholders is critical for the success of any project. Understanding the importance and influence of each stakeholder enables you to define the appropriate depth and frequency of communication you have with that person throughout the project.

This section defines the lines of communication and the methods to be used. In other words what should be communicated, and to whom. This may seem unnecessary during the planning phase of a project but focusing on the importance of communication at this stage will eradicate serious problems later on that could result from too much or too little communication.

The ease of sending emails and attached documents means that there is a real risk of over-communication. This results in team members becoming snowed under with largely irrelevant emails. To avoid this, the ultimate goal of communications management is to ensure that stakeholders receive the information they need to know at the appropriate time and at the appropriate level of detail.

This section should identify what each role is responsible for communicating, how often they need to communicate, what communication tool and medium to use and any specific triggers for communication. This section needs to consider the following:

**Planning Communications** – details the communications the project manager will have with each stakeholder and within the project team. This needs to include the format (email, memo, etc), level of detail, urgency and content for each communication along with a defined frequency. Within any project there is a continual need to keep everyone involved updated, so different individuals will be responsible for certain types of communication.

**Distributing Information** – this describes how you will actually distribute information appropriately to interested parties during the project. This can take many forms, e.g. email, phone, text, web conferences, intranet, presentations, reports etc.

### ***COMMUNICATIONS MANAGEMENT CONTINUED***

**Managing Stakeholder Expectations** – having a clear understanding of your stakeholders expectations will enable the project manager to communicate with each in a way that addresses their concerns and interests when wanting to resolve issues. There are certain documents that any alterations to the project need to be recorded in to ensure your stakeholders are up-to-date. These are the stakeholder register, issue log and if appropriate the stakeholder management strategy.

**Reporting Performance** – this section defines the style of reporting to be used, often this is a simple traffic light system to report the status of different activities or work packages. Stakeholders are usually most interested in how actual events compare to the forecast and the Earned Value method (EVM) is a popular way to do this.

### SCOPE MANAGEMENT

Many project managers use the project charter scope statement as a basis for this section, which must define, communicate and gain agreement on the exact details of the project. This process helps to avoid confusion arising between the project members and stakeholders that cause delays, increased costs, re-works or any other unintended consequences.

This section needs to consider the following:

**Documenting Requirements** – this is where you define your customers or end users needs and expectations. You will use the high-level requirements outlined in the project charter as a basis and then incorporate the interest of your project's stakeholders. These will be listed in the stakeholder register. There are several techniques, such as, interviews, facilitated workshops, questionnaires, surveys, prototypes etc. that you can use to collate your project requirements

**Defining the Scope** – details the activities that must be completed to ensure the project deliverables are achieved. You must define exactly what is excluded from your scope so that stakeholder expectations are set appropriately. This section needs to define the exclusions, constraints and assumptions made for the project. You must list all the management reports and documents you will produce during the project. You also need to define what your project's 'acceptance criteria' will be so that everyone involved knows what constitutes a completed project.

**Creating the Work Breakdown Structure** – shows how you will break down your project deliverables into manageable chunks of work, this is known as decomposition. You continue to breakdown each deliverable until you reach the work package level. At this level you can assign estimated costs, as well as define and manage the activity duration. You must be careful not to breakdown deliverables to the point where the project becomes inefficient.

### ***SCOPE MANAGEMENT CONTINUED***

Your WBS must include all project work and can be represented in a variety of ways, the most common are as an outline or an organization chart. From your WBS you will also produce your:

**WBS dictionary** – provides a definition of the work packages.

Scope baseline – an approved version of the detailed scope statement.

**Verifying and Controlling Scope** – this section formally establishes your stakeholders' agreement and acceptance of your completed project deliverables. Scope verification also provides details of how change requests will be proposed, validated and accepted or rejected.

You will also need to define how changes to your project scope and the scope baseline will be managed. This is a natural part of any project and a strict control process is essential. In addition to this plan you will also use the work performance information and your requirements document to administer and manage this control.

### **CHANGE MANAGEMENT**

In many organization's this is a separate section and is where you will detail and define how changes to your project are identified, assessed and a decision is made as to whether they are accepted or rejected. In some instance the organization has its own 'Change Control Board' or 'CCB' that manages this aspect of a project and judges the likely impact of each proposed change.

This section also details who within the organization or project team has the authority to approve changes, which individuals can submit changes, how proposed changes are recorded and monitored.

### **SCHEDULE MANAGEMENT**

The project schedule is the roadmap for how the project will be executed. Schedules are an important part of any project as they provide the project team, sponsor, and stakeholders a picture of the project's status at any given time.

This section explains how the project schedule is developed and managed. It details the procedures for monitoring progress against the schedule baseline and making changes to it. This would include the timing and format of progress meetings including who should attend.

The purpose of the schedule management plan is to define the approach the project team will use in creating the project schedule. This plan also includes how the team will manage changes after the baseline schedule has been approved, including: identifying, documenting, prioritizing, approving, and publishing all schedule-related changes.

This section needs to consider the following:

**Defining Activities** – from the WBS you define each step involved in performing a particular activity or activities required to complete a work package. This creates you activity list, which details which team member is responsible for the activity, dependencies with other activities and initial cost estimates.

**Sequencing Activities** – using the activity list you can now define the relationships between the different activities and decide the most efficient order they must be performed in. The end result is displayed in a network diagram.

**Estimating Resources** – now you have defined each activity you must estimate what type of resources and what quantities each one needs. It is important to identify the right skills you need for your project here and to refine them in the develop schedule process. A resources calendar presents the duration and quantity of the resources your project requires.

### ***SCHEDULE MANAGEMENT CONTINUED***

**Estimating Time Required** – using the output from estimating activity resources you can now ‘define’ how long each activity will take depending on the number of resources you have available. The most popular techniques used for estimating are:

- Analogous estimating.
- Parametric estimating
- Three point estimate

These duration estimates will change as the project progresses.

**Developing and Controlling the Schedule** – now you have all the information you require to develop your schedule. Using a scheduling tool and method you will create your ‘Critical Path’ (CPM) or ‘Critical Chain’ (CCM) that will require several version before you match the schedule to the agreed milestones and completion date.

This process enables you to observe the impact of altering resources and compressing certain activities. This is also where you establish how you will assess, agree and implement necessary changes. Accepted changes will result in the project schedule and records being updated and communicated throughout the team.

The schedule management plan is the result of these processes and defines how your project will be time managed and what techniques and tools will be used. The management of time in a project is based upon activities not on the WBS elements.

### BUDGET MANAGEMENT

This section explains how the project's costs are going to be measured, reported and controlled. This details the procedures for: monitoring project cost, identifying who is responsible for managing them, who has the authority to approve changes to the project budget, and how cost performance is measured and reported including report formats, frequency and to whom they are presented. For example,

- *If the project begins to incur cost overruns, at what thresholds must specific actions take place?*
- *If the cost variance exceeds 15%.*

Then the project must undergo a review to determine what actions must take place to bring the project back on track. This section needs to consider the following:

**Estimating Costs** – this is where you define at the outset of the project what you expect the costs to be. You will specify who is responsible for managing project costs, as well as the person or individuals who are responsible for authorizing changes to either the project or budget.

Your organization may have set guidelines for how accurate your estimates must be. The input to your estimates will come from four documents – the scope statement, the project schedule, the HR plan and the risk register.

**Budgeting Costs** – this describes how you will manage the estimated costs against the baseline. The formats and standards that will measure, monitor, report and control are defined in this section.

**Controlling Costs** – outlines the procedures you have put in place to monitor costs and how change requests along with their financial implications will be incorporated into the cost baseline. The latter is then compared to the work performance information which details activities or work packages have been completed and those still being worked on.

A common technique used in this area is Earned Value Management (EVM) where your forecast of expenditure is compared to the projects actual costs. (Return on investment is not a concern of the project team or plan.)

### QUALITY MANAGEMENT

This section details the specific quality assurance and quality control measures that will be used and why these measures have been chosen. Quality should also be considered from both a product and process perspective and must always be planned into a project in order to prevent unnecessary rework and waste.

Even if the organization already has a standardized approach to quality, this must be defined and communicated to all project stakeholders.

This section needs to consider the following:

**Planning Quality** – collates all the required quality standards and then outlines how the project team will meet and demonstrate its compliance to the quality baseline. This results in the Quality Management Plan which assigns a quality metric for each deliverable, that is the test criteria it must pass to be signed off as acceptable.

**Performing Quality Assurance** – this process defines the quality control measures of the project and audits that these are being adhered to. Any changes identified in the process need to be reflected in a revised Quality Management Plan.

**Performing Quality Control** – is the actual execution of the quality control activities. These have been designed to measure how well they have been followed and where applicable recommend changes.

**Defining Testing Requirements** – a significant part of quality is testing that the deliverables meet the acceptance criteria and where appropriate independent validation criteria (legislative and compliance requirements). This section defines the testing team, their roles, responsibilities and resource needs.

When a project fails to meet its quality requirements there are serious repercussions on the delivery and acceptance of the project.

### RISK MANAGEMENT

This section defines the key roles and responsibilities for risk management activities, and establishes the framework in which the project team will identify risks and develop strategies to mitigate or avoid those risks.

It documents the procedures for identifying, analyzing, prioritizing, assigning and mitigating a risk. As well as those for implementing a contingency plan should a risk be realized and become an issue.

This section needs to consider the following:

**Planning Risk Management** – this involves the project management team looking at the key project areas and judging what degree of risk they contain. They consider risks to the project by categories defined in a Risk Breakdown Structure (RBS) and then assess the probability and likely impact of each risk. This section would also define how risk activities are to be documented.

**Identifying Risks** – It is the responsibility of the project management team to identify, analyze the impact of risks to the project. These are then documented in the Risk Register, which describes the risk, its likely impact on the project if it happens. A risk can be defined as something that has an effect on the project objectives, if it has no effect on the latter its is not a risk.

**Performing Qualitative & Quantitative Risk Analysis** – this aspect looks at the likely probability and impact a potential risk could have on the project and is often displayed using a matrix format. A longer more complicated and costly analysis of risk is trying to assess the quantitative element where an actual percentage is applied to probability and a monetary value is assigned to the impact.

**Planning Risk Responses** – once the project risks have been identified and analyzed the project management team need to decide on the most appropriate strategy to adopt in advance. This falls into four ways to respond to such threats – avoid, mitigate, transfer and accept.

### *RISK MANAGEMENT CONTINUED*

**Monitoring & Controlling Risks** – this details the practical ways in which the project manager will monitor risks and implement risk responses as required. As the project progresses the risk register and planned responses will be updated as risks are not longer relevant and new ones occur.

### **SUPPLIER MANAGEMENT**

This section identifies the products, services and resources that need to be acquired or purchased from outside of the project team. It will include the timeframe for each resource and the quoting and management processes attached to this procurement.

It will also explain the procedures for making purchases and soliciting requests for quotes (RFQ) from service providers, and detail how the suppliers will be evaluated against the Statement of Work (SOW). This section needs to make clear who has purchasing authority and at what level.

For example,

*A team leader might have a purchase authority limit that is different from the project manager.*

This section needs to consider the following:

**Planning Supplier Management** – this process details and records the expected purchase decisions. It also identifies the type of contract the purchase would be and potential suppliers.

**Conducting Procurements** – outlines how quotes will be evaluated, selected and desired contractual terms.

**Managing Supplier Relationships** – this area details how the procurements for the project will be managed. It also defines how suppliers' performance and service will be monitored and adjustments made if appropriate. This ensures that strict control on expenditure is maintain and kept within budget.