

# PROJECT PLAN

FOR

PROJECT NAME HERE

VERSION # \_\_\_\_\_

DATE

**Reviewed and Approved for submittal to Executive Sponsor**

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<name>, Project Manager

**Project Plan Approved for submittal to Executive Sponsor:**

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<name>,

**Project Plan Approved for Implementation:**

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<name>, Executive Sponsor

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# 1. PROJECT INITIATION (INCLUDES VISION STATEMENT)

Project Title:	Date:
State Date:	Target Finish Date

## VISION STATEMENT

1. Clarify the description of this project (what, where, and by when). (In the "what", include a description of the problem to be solved.)

2. Identify the desired results (outcomes, accomplishment, and deliverables) for this project, and list them in order of highest priority to lowest. (Review your stakeholders' desired results to help clarify deliverables.)

Desired Results	Priority

3. Compare the project vision statement with the SMART criteria.

	Specific
	Measurable
	Achievable
	Relevant
	Time-Dimensioned

## ORGANIZATIONAL STRATEGIC INITIATIVES

How does this project support the strategic initiatives of your organization?

## APPROVALS

5. Preliminary Approval (Executive Sponsor, Key Stakeholders) to Proceed to the Plan Stage. This needs to be completed for every project.

Signature:	Date:
Signature:	Date:
Signature:	Date:

## 2. PROJECT PERFORMANCE SPECIFICATIONS

### PROJECT PERFORMANCE SPECIFICATIONS FORM

Prioritize performance specifications (quality/scope, time, and cost) for this project.

1.

2.

3.

Notes:



## 4. WORK BREAKDOWN STRUCTURE (WBS)

Ideally this is completed in MS Project using the Franklin Covey Templates. The WBS is done after the Vision Statement is completed. Enter in the major and minor pieces with appropriate tasks. Whenever possible use milestones (zero duration tasks) at the end of each major piece.

Insert an appropriate view of the WBS from Microsoft Project 2000 below. Use the Copy Picture command within MSP 2000 to copy the view into the Windows Clipboard. Then paste the view below.

ID	Name	Start	Duration	Finish	Internal Cos	External Cos	Capital Cos	Qtr	
								Aug	Si
0	<b>FC WBS Template</b>	Aug 28 '01	1 da	Aug 28 '01	\$0.00	\$0.00	\$0.00		
1	Major Piece 1	Aug 28 '01	1 da	Aug 28 '01	\$0.00	\$0.00	\$0.00		
2	Minor Piece 1	Aug 28 '01	1 da	Aug 28 '01	\$0.00	\$0.00	\$0.00		
3	Task 1	Aug 28 '01	1 da	Aug 28 '01	\$0.00	\$0.00	\$0.00		
4	Task 2	Aug 28 '01	1 da	Aug 28 '01	\$0.00	\$0.00	\$0.00		
5	Task 3	Aug 28 '01	1 da	Aug 28 '01	\$0.00	\$0.00	\$0.00		
6	Task n	Aug 28 '01	1 da	Aug 28 '01	\$0.00	\$0.00	\$0.00		
7	Minor Piece 2	Aug 28 '01	1 da	Aug 28 '01	\$0.00	\$0.00	\$0.00		
8	Minor Piece 3	Aug 28 '01	1 da	Aug 28 '01	\$0.00	\$0.00	\$0.00		
9	Minor Piece n	Aug 28 '01	1 da	Aug 28 '01	\$0.00	\$0.00	\$0.00		
10	Milestone	Aug 28 '01	0 day	Aug 28 '01	\$0.00	\$0.00	\$0.00		8/28

## 5.1 RESOURCE MANAGEMENT PLAN / PROJECT TEAM

The Resource Management Plan has two parts: 1.) Specific identification of the people that will fulfill the roles on the project and 2.) A completed Responsibility Assignment Matrix (RAM).

Roles	Responsibilities
Executive Sponsor	
Key Stakeholder	
Key Stakeholder	
Key Stakeholder	
Project Manager	
Phase Leader	
Phase Leader	
Phase Leader	
Team Member	
Team Member	
Team Member	
Team Member	
Notes:	



## 5.2 RESPONSIBILITY ASSIGNMENT MATRIX (RAM)

The RAM shows the responsibilities and cross-organizational interaction of each stakeholder group relative to the major activities and/or deliverables on a project. The RAM does not show individual or detailed resource assignments for tasks. Detailed assignments are made in the WBS in Microsoft Project 2000.

Legend:

- ❖ **P** = Participant
- ❖ **A** = Accountable
- ❖ **R** = Review Required (but not required for approval)
- ❖ **I** = Input Required
- ❖ **S** = Sign-off Required (i.e. PMIC, Executive Sponsor)

## 6. COMMUNICATION MANAGEMENT PLAN

The Communication Management Plan identifies who must receive what information, at what intervals, what level of information is required, who will provide it, and what medium will be used. Remember this is the plan, that is, the expectations about how communications will be handled and managed for the project.

<b>ROLE MAJOR ACTIVITIES &amp; DELIVERABLES</b>	<b>PROJECT TEAM MEMBERS</b>	<b>LINE MANAGEMENT</b>	<b>PROJECT MANAGER</b>	<b>PMIC</b>	<b>EXECUTIVE SPONSOR</b>	<b>PARTNERS &amp; CUSTOMERS</b>

## 7. BUDGET

The Budget is derived from the WBS and may be included in MSP. The Budget should be linked to the budget process.

COMMUNICATION MANAGEMENT PLAN							
TYPE OF COMMUNICATION	MEDIUM	SENDER	START DATE	TIMING OR FREQUENCY	AUDIENCE OR PARTICIPANTS	MESSAGE OR OBJECTIVE	STORAGE LOCATION
Will this communication be a kickoff meeting, status report, meeting minutes, progress report, executive review, or something else?	Will you use email, voicemail, meeting, report, project plan, web page, a combination of these or something else?	Who will be responsible for initiating this communication?	Assumes a recurring communication throughout the project.	How often will this communication occur (every other week, daily, monthly)?	Who must be included in this communication?	What is the expected outcome of this communication?	Where will stakeholders find this communication record or document (e.g. Meeting minutes)?
Weekly Status Report							
Financial Reports (Budget Plan vs. Actual)							
Monthly Project Review Meetings							
Executive Reviews							



# APPENDIX E: CHANGE REQUEST FORM

## PROJECT CHANGE REQUEST

Complete this tool if the change meets one or more of the following criteria:

- The change is estimated to cost more than \_\_\_\_\_ (fill in).
- The change moves the schedule by more than \_\_\_\_\_ % (fill in).
- The change alters the original project vision statement.

1. Describe the proposed project change.

2. List the reasons for the proposed change.

1. Identify how the change will affect the following project elements:

- Project Schedule

- Cost

- Resources

4. Does the change affect the original project vision statement? If yes, how?

5. Describe the effect on the project if this change is not made.

### Accountability – Person Making the Change Request

Name:

Date:

### Stakeholder Approval

Name

Date:

Signature

Name

Date:

Signature

Name

Date:

Signature

Name

Date:

Signature

# APPENDIX F: CHANGE MANAGEMENT LOG

CHANGE MANAGEMENT LOG						
ID#	OWNER OF CHANGE	DATE INITIATED	DESCRIPTION	MAJOR OR MINOR	DECISION	COMM. PROCESS

# APPENDIX G: STATUS REPORT FORM

## STATUS REPORT FORM

Name:	From Date:
	To Date:

Assigned Tasks During This Period	Percent Complete (0%, 25%, 50%, 75%, 100%)
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	

Accomplishment Highlights

- 1.
- 2.
- 3.
- 4.

Outstanding Challenges / Issues	Proposed Solution
1.	
2.	
3.	
4.	

Additional Comments

# APPENDIX H: PROJECT REVIEW MEETING STANDARD AGENDA

## PROJECT REVIEW MEETING STANDARD AGENDA

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1. Review minutes from last project review meeting
2. Review Project Plan
  - ❑ Completed Tasks
  - ❑ Uncompleted Tasks
3. Share Accomplishments
4. Review Deliverables
5. Monitor Project Performance
  - ❑ Schedule
  - ❑ Cost
  - ❑ Scope
  - ❑ Quality
6. Review and Address Change Requests
7. Identify Issues
8. Define Solutions to Issues
9. Develop Action Plan



# APPENDIX I: PROJECT EVALUATION

## PROJECT EVALUATION

**Project Title:**

**Project Manager:**

**Project Start Date:**

**Finish Date:**

*On a scale of 1 to 5, rate the following areas to describe your project.*

**1** Very poor

**4** Good

**2** Poor

**5** Very good

**3** Average

<b>1 VISUALIZE</b>	<b>Rating</b>
1. The end result met original desired results.	Enter a number value from 1 to 5 here.
1. The original plan was achievable (realistic).	
1. I (we) accomplished what was actually achievable.	
1. How do others view the project?	
• Customers	
• Team Members	
• Management	
• Self	
• Other	
1. Stakeholders were accurately identified.	
1. Stakeholders' desired results were understood.	
	Total: _____
<b>1 PLAN</b>	<b>Rating</b>
1. The project met budget specifications.	Enter a number value from 1 to 5 here.
1. The project met timeline specifications.	
1. The project met technical specifications.	
1. Hotspots were clearly identified.	
1. Hotspots were successfully managed.	
1. Adequate resources were identified and used.	
	Total: _____
<b>1 IMPLEMENT</b>	<b>Rating</b>

1. I (we) implemented the plan successfully.	Enter a number value from 1 to 5 here.
1. I (we) revised the plan sufficiently and expediently.	
1. Necessary resources were available.	
1. Review meetings were timely.	
1. Review meetings were managed effectively.	
1. Project documentation was adequate.	
	Total: _____

**1 CLOSE**

**Rating**

1. The project ended in a timely manner.	Enter a number value from 1 to 5 here.
1. Project documentation was complete.	
1. We received evaluations from all team members.	
1. The project documentation can help us identify and close the gap between time estimates and real time.	
1. The project documentation can help us identify and close the gap between estimated costs and actual costs.	
1. We have the identified areas of improvements and ways to improve those areas for the next project.	
	Total: _____

# APPENDIX J: PROBLEM ANALYSIS

## PROBLEM ANALYSIS

Project Title:

Project Manager:

Project Start Date:

Finish Date:

### 1 PART 1

*Identify the statement on which you scored the lowest for each stage (Visualize, Plan, Implement, and Close) and write that statement below. For each statement that you identify, write possible solutions to improve that area on your next project.*

Problem Description	Solution Suggestions
<b>.1 VISUALIZE</b>	
<b>.1 PLAN</b>	
<b>.1 IMPLEMENT</b>	
<b>.1 CLOSE</b>	

## APPENDIX K: BEST PRACTICES / LESSONS LEARNED

### BEST PRACTICES / LESSONS LEARNED TEMPLATE

**Best Practices: “What do you believe were best practices and/or what worked well on this project that you would like to share with others?”**

Topic	Description

**Lessons Learned: “What lessons learned would you like to share with others?”**

Topic	Description