

[Your Company Name]

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# PROJECT MANAGEMENT PLAN [YEAR]

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# 1.

## Overview

Project Purpose, Objectives, and Success Criteria

Project Deliverables

Assumptions, Dependencies, and Constraints

References

Definitions and Acronyms

Evolution of the Plan



**REMEMBER**

This chapter provides an overview of the project’s motivation, objectives, success criteria, major deliverables, and constraints. You might include a top-level summary of major milestones, contract type, start and end dates, required resources, schedule, stakeholders, and budget.

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## Project Purpose, Objectives, and Success Criteria



**TIP**

Define the purpose, scope, and objectives of the project and its delivered products. This information might already appear in the Vision and Scope Document. If so, avoid duplicating information in both places. Briefly, state the business needs to be satisfied and the methods by which satisfaction of those needs will be determined. Define quantitative and m

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## Project Deliverables



**TIP**

List the major items to be delivered to the customers, subcontractors, integrators, or other parties. As appropriate, list the deliverable, their recipients, interim and final delivery dates, and delivery method. A table like the one below is a good way to show this information

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Deliverable	Recipients	Delivery Date	Delivery Method	Comments

## Assumptions, Dependencies, and Constraints



**TIP**

This subsection describes known assumptions upon which the project is based (facts that are known to be true are not assumptions); any external events or externally-supplied items upon which the project depends; and the constraints under which the project will be conducted. Of the five project dimensions of features, quality, schedule, cost, and staff, determin

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## References



**TIP**

List all documents and any other materials used as sources of information for this plan. For online documents, provide hyperlinks wherever possible.

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## Definitions and Acronyms



**TIP**

Define any acronyms or project-specific terms. For each acronym, give both the meaning of the abbreviation and a definition of the item.

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## Evolution of the Plan



**TIP**

Describe the method for producing both scheduled and unscheduled updates to this plan and how the new information will be disseminated. For example, you could state that you will review the plan every time the product requirements specification or certain other major project artifacts are updated or when project constraints or resources change. All

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# 2.

## Project Organization

External Interfaces

Internal Structure

Roles and Responsibilities





### REMEMBER

This section describes interfaces to entities outside of the project, identifies the internal project structure, and defines roles and responsibilities for the project.

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## External Interfaces



### TIP

Describe the organizational boundaries between the project and external entities. Define and describe communication with senior management, customers, subcontractors, purchasing, sales, marketing, legal, finance, procurement, installation, and support organizations, standards or certification bodies, auditors, manufacturing, and the like.

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## Internal Structure



### TIP

Describe the internal structure of the project organization, including interfaces between the units of the software team. It might be helpful to include organization charts or matrix diagrams to illustrate lines of authority, responsibility, and communication. Identify representatives of key units, such as senior management, engineering support function

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## Roles and Responsibilities



### TIP

List the major project team roles and the individuals who will fill these roles, along with the specific responsibilities those individuals will have. Identify the organizational units or project team roles that are responsible for all major work activities and supporting processes. Consider the following list of potential project roles, adapted to your organization's local te

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# 3.

## Managerial Process Plans

Start-Up Plans

Work Plan

Control Plan

Risk Management Plan

Financial Management Plan (Cost/Budget Management)

Issue Resolution Plan

Project Close-Out Plan



#### REMEMBER

This section defines the various project management plans and activities for the project.

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#### TIP

This section specifies plans that will lay a solid foundation for a successful project. Depending on the size and scope of the project, you may incorporate these plans directly in this section, or each section may simply contain a reference or hyperlink to a separate document.

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## Start-Up Plans



#### TIP

This section describes how project estimates will be prepared, including:

- The methods, tools, and techniques that will be used to estimate project size, effort, cost, schedule, and critical computer resource requirements
- The timing of the estimates

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## Estimation Plan

Start writing here...



#### TIP

Specify the number of staff needed by skill area or project role (see section 2.3), along with required skill levels, and the duration for which each staff member is needed. Describe the anticipated staffing profile (the mix of skills and effort levels needed at various times in the project) when people will be added to the project or depart from it, and how new t

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## Staffing Plan

Start writing here...



#### TIP

This section specifies any training that will be needed to ensure the necessary skill levels needed for the project. The types of training, number of people to be trained, and the training methods should be specified. The Project Manager's responsibilities include identifying training requirements and working with local sources to provide training.

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## Staff Training Plan

Start writing here...



**TIP**

This section specifies the plan for acquiring the resources other than personnel needed to successfully complete the project. Describe the resource acquisition process. Specify the points in the project schedule when the various acquisition activities will be needed. List any constraints, such as contention for shared resources (e.g., test facilities). Address a

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## Resource Acquisition Plan

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**TIP**

Record commitments that the project as a whole is making to external parties, as well as major commitments that one individual or group within the project team is making to another. This gives those involved a clear, shared understanding of their commitments and allows project participants to track whether or not commitments are being fulfilled. A ta

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## Project Commitments

*Start writing here...*

## Work Plan



**TIP**

Specify the various work activities required to produce the project's major deliverables, including the contents and timing of the activities. Use a work breakdown structure or a table to depict the work activities, corresponding deliverables, and the relationships among the activities. If the work breakdown structure is stored in a separate location, such as a

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## Control Plan



**TIP**

This section describes how the project will control and report on project status and activities. Specify the frequency at which the various project status indicators are to be monitored and specific events that could trigger a status evaluation.

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TIP

Describe how the project will manage its data, including deliverable and non-deliverable documents, project status metrics, reports, specifications, and so on. Address the following:

- Types of data to be managed

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## Data Control Plan

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TIP

Specify the mechanisms for measuring, reporting, and controlling changes to the product requirements. Describe how to assess the impact of requirement changes on product scope and quality, and on the project schedule, budget, resources, and risk factors. If a separate change control process is being followed, refer to that here. If changes in requirements are being followed, refer to that here.

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## Requirements Control Plan

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TIP

Specify the control mechanisms used to measure the progress of the work completed at milestones. Specify the methods and tools used to compare actual schedule performance to planned performance and to implement corrective action when actual performance deviates from the planned or required performance. A project schedule in the form of a Gantt chart or PERT chart is often used to track progress.

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## Schedule Control Plan

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TIP

Specify the control mechanisms used to measure the cost of work completed, compare actual to budgeted cost, and implement corrective actions when actual cost deviates excessively from budgeted cost. Specify the intervals or points at which cost reporting is needed and the methods and tools that will be used to manage the budget. For example, you might use earned value management (EVM) to track cost performance.

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## Budget Control Plan

*Start writing here...*



TIP

Identify the regular reports and communications expected of the project, such as weekly status reports, regular reviews, and as-needed communication. The exact types of communication vary between groups, but it is useful to identify the planned means at the start of the project. Specify the reporting mechanisms, report contents, and information flows

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## Communication, Tracking, and Reporting Plan

Type of Communication	Communication Schedule	Typical Communication Mechanism	Who Initiates	Recipient
Status Report	every Friday	team meeting	Project Manager	Project Team
Schedule and Effort Tracking Report	weekly	email	Project Manager	Program Manager
Project Review	monthly	face to face	Project Manager	Project Team
Risk Mitigation Status	as mitigation actions are completed	email	responsible team member	Project Manager
Requirement Changes	as changes are approved	email and change control tool	CCB Chair	affected Project Participants
Supplier Management Review	at project life cycle gates	videoconference	Program Manager	Project Manager, Program Manager, Subcontract Manager



TIP

Specify the methods, tools, and techniques used to collect and retain project metrics. The metrics to be collected, the collection frequency, and how the metrics will be validated, analyzed, reported, stored, and used should all be addressed.

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## Metrics Collection Plan

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## Risk Management Plan





**TIP**

This section specifies the plan for identifying, analyzing, prioritizing, and controlling project risks. It should describe the procedures for contingency planning and the methods used in tracking risks, evaluating changes in individual risk exposures, and responding to those changes. Include a plan for ongoing risk identification throughout the project's life cycle.

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## Financial Management Plan (Cost/Budget Management)



**TIP**

Document the agreed to Financial Measurement Baseline (FMB) for the project and define how it will be tracked. Define the reviews that will be established for reporting on the financial health of the project. Also, define the invoicing requirements and timelines for the project. This section should describe the financial management approach for the project, including the budgeting process.

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## Issue Resolution Plan



**TIP**

Describe how problems, issues, and action items that arise on the project will be documented, resolved, and tracked to closure. Identify the project's decision-makers for issues such as requirements baselining, requirements changes, resource contention, priority conflicts, etc.

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## Project Close-Out Plan



**TIP**

This section describes the actions necessary to ensure an orderly closeout of the project. Address staff reassignment, archiving of project materials, recording of metrics, holding a project retrospective, and preparation of a final report to include lessons learned and analysis of project objectives achieved.

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# 4.

## Technical Process Plans

Process Model

Methods, Tools, and Techniques

Configuration Management Plan

Quality Assurance Plan

Documentation Plan

Process Improvement Plan



#### REMEMBER

This section describes the technical approaches to be used on the project. Depending on the size and scope of the project, these plans may be incorporated directly in this section, or each section may simply contain a reference or hyperlink to an external plan. For example, nearly every project should create separate Configuration Management and

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## Process Model



#### TIP

Describe the product development life cycle that the project will use. Examples include a waterfall, iterative, and incremental (e.g., evolutionary, spiral, or agile). If an iterative or incremental model is used, identify clear milestones, and provide the planned iteration number for each task in the work breakdown structure. The project's Gantt chart should reflect the

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## Methods, Tools, and Techniques



#### TIP

This section describes the design and development methodologies, programming languages, software and hardware tools, and operating environments to be used, as well as pertinent technical and management standards and procedures. Describe the following:

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## Configuration Management Plan



#### TIP

This section could contain the configuration management plan for this project. For any but very small projects, this section should refer to a separate document. The CM plan should describe the activities and methods used for configuration identification, control, status accounting, auditing, and release management. The configuration management plan should

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## Quality Assurance Plan



TIP

This section could contain a quality assurance plan for this project. For any but very small projects, this section should refer to a separate document. The QA plan should describe the activities and methods used to build a high-quality product by the sensible application of an appropriate process. The plan should indicate the relationships among quality assurance,

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## Documentation Plan



TIP

Describe the plans for creating system documentation deliverables, including installation and maintenance guides, user guides, reference manuals, on-line help systems, release notes, and so forth. List the documents to be created. For each type of documentation, describe any pertinent template, standard, or conventions to be followed; who will prepare it; who

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Document	Template or Standard	Created By	Reviewed By	Target Date	Distribution

## Process Improvement Plan



TIP

This section describes plans for assessing the project and its processes, determining areas for process improvement, and implementing improvement plans without seriously disrupting an ongoing project. Each project should address at least one process improvement activity, selected from the following list:

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