

PROJECT MANAGEMENT ESSENTIALS

Project Management Plans

BS6079, the British Standard for Project Management, offers guidelines on the level and type of information that should be defined in the early stages of the project, in the form of a high-level **Project Management Plan** (also known as **The Project Charter** or **The Project Execution Plan**). Such a document should be used as a reference throughout the project, to ensure that the management of the project is carried out consistently and in line with policy and procedures. The document also serves a very useful purpose in aiding decision-making throughout the project, as it provides a constant focus for how the project should be conducted.

The Purpose of the Project Management Plan

The purpose of this document is to provide a very comprehensive baseline of **what** has to be achieved by the project, **how** it is to be achieved, **who** will be involved, how it will be **reported** and **measured** and how information will be **communicated**. It should be used as a reference for any decision that is made on the project and for clarification of unclear areas.

The PMP should be prepared primarily by the Project Manager, although interface with the Project Sponsor, client, stakeholders, users etc. will be required. Often the business case will be used as the starting point for the PMP. Furthermore, the Project Manager should own the PMP, and it should be developed with the Project Team.

The PMP should be available to all project members, as it can provide essential project information and be used to introduce project members to the project. Reducing the time required to bring new project team members up-to-speed.

Although it is essential that the PMP is developed as part of the project initiation and definition, it should be a living document that evolves as the project progresses, and should be updated with the latest relevant information as required.

Typical contents of a PMP

The Project Management Plan (example)

Purpose	Intended Audience
<ul style="list-style-type: none"> • Provide the Project Manager with the authority to apply organisational resources, to project activities. • Establish project purpose. • Demonstrate the project team and customer commitment to the project. • Focus on customer and project expectations. • Utilise project management principles to manage the 	<ul style="list-style-type: none"> • Customers and their staff. • Stakeholders.

project from beginning to end.	
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Components

Executive Summary

Write a few paragraphs describing at a high level the key elements of the project, which are detailed throughout the project plan.

Strategic/Organisational Alignment

- **Specific Strategic Initiatives**
Answer the questions:
 - What customer's initiatives does this project support?
 - What are the expected outcomes or benefits (impact on business processes, systems, people, organisations, etc.)?
- **Project Stakeholders Analysis**
Who are the customers, sponsors and team members?

Project Scope Definition

- **Mission**
State the purpose of the project.
- **Objectives**
Clearly state 1-2 (minimum) project objectives that are S.M.A.R.T.
- **Scope/Major Deliverables**
The project deliverables define the products/services that are produced by the project and clearly state what is not produced by the project. Deliverables not included may be those constructed in a later project phase, or those to be constructed by another project. A Work Breakdown Structure (WBS) is key for communicating what will be delivered.

Be as clear as possible in defining the project deliverables. Clear and obtainable deliverables set the direction of the project and eliminate confusion about what work is performed and what products/services are delivered.

- **Quality Specifications**
Quality specifications describe the product or service performance criteria from a customer perspective.
- **Assumptions**
Project assumptions clarify grey areas in the project scope. Any known assumptions that have been made regarding the project that may influence this agreement should be noted.

Note: assumptions are made to fill knowledge gaps; they may later prove to be incorrect and can have a significant impact on the project. List only those assumptions that have a reasonable chance of occurring.

Feasibility Assessment and Contingency Plans

This section should evaluate the economic, technical, operational, and organisational feasibility of the project; identify and assess project risks; and provide contingency plans to address high-impact risk factors.

Constraints

List any known constraints imposed by the environment or by management. Typical constraints may include fixed budget; limited resources; imposed interim and/or end dates; predetermined software systems and packages and other predetermined solutions.

Human Resource Requirements

Define the project team's organisations, roles and responsibility requirements. Provide a description of major participants, including the various internal and external organisations.

Human resources include your team members, client, sponsor and end-users, and any on-site vendors with whom you may consult for direction in completing your project. Be sure to list contact information for, and the kinds of information/expertise to be provided by, each of these human resources.

Role	Responsibility	Time Commitment	Duration	Source (internal/external)

Identify training requirements and begin to develop the Project Training Plan.

Training includes:

- Technical training relevant to the project domain (e.g. IT development, procurement, logistics, systems training etc.).
- Team training (e.g. team building, team effectiveness, team performance, consensus decision-making etc.).
- Project management (e.g. project management concepts).
- Procedures/user manuals, training liaison, etc. needed for/by business users.

Material/Equipment Requirements

- This section should define the space, hardware/software and other resources needed to complete your project successfully.
- Space resources include a designated team meeting and work site, including any on-site office space your client may provide.

- Hardware/software resources include those provided by you as a team and those provided by your client.
- Make crystal clear who will provide what. For example, does the client assume that you have the necessary software tools to complete your project, or will your client provide them? Other resources include any documentation of the existing system, vendors' technical literature, systems manuals etc. that you will need to consult.

Project Schedule and Milestones

Define milestone and activity schedule for the project, integrating three key elements: deliverables, due date or duration, critical dependencies.

This section contains text and diagrams/charts.

In the text section, briefly discuss the project schedule (e.g. timeline for major phases) and define the project milestones and baselines. Here you should also identify any critical task or resource dependencies that may significantly impact your ability to adhere to the planned schedule (e.g. if the client must provide certain IT resources or access to end-users, in order for you to complete a task).

In your initial project Gantt chart, identify and schedule - in detail - all early project activities and resources related to analysis and design and (more broadly) later activities such as construction, testing, and installation. You will identify and schedule these later activities in detail as you develop a clearer sense of your project deliverables (i.e. after you have minutely defined system requirements).

Note: if your project allows you to clearly define requirements at this time, then include these requirements in your project overview section and outline ALL activities in detail in your initial project Gantt chart. It is strongly encouraged that a **CPM Network Model** (what MS Project calls a **PERT** diagram) is created in addition to your Gantt chart, so that task dependencies are made explicit.

Your Gantt chart should include - at minimum - the following information:

- activity ID and name
- brief activity description (can be provided in a separate table in your Project Schedule section)
- start and completion dates
- team member(s) assigned
- resources required (can be provided in the table noted above; resources include those listed in the Project Resource section above, and should also indicate the approximate number of hours each team member will need to devote to this activity)
- schedule analysis

Be sure to schedule team meetings and client reviews. That is, plan not only the activities required to deliver your product, but also those activities required to manage your Process.

Budget/Cost Estimate

Estimates are typically prepared for:

- the duration of the project
- the human resource requirements in terms of numbers and types of skills required on the team (Base+1)
- the cost of performing the work defined in the project plan (Base+1)
- the material and equipment resources, in terms of quantity and duration

As the project traverses through the various project management phases, more information will be known and unpredictability will be reduced. Therefore, at the end of each phase and after each milestone, the cost/benefit analysis is updated and the information communicated as needed.

Good estimates require:

- time and focus
- historical information or previous experience
- multiple, consistent estimating methods
- knowledge of the work

Costs are divided into three types:

1. **Capital Items:** associated with the procurement of assets that are capitalised, such as hardware and software.
2. **Expense Items:** associated with operating expenses, material, travel, training, supplies, books, copying, printing, etc.
3. **Labour:** associated with the total time team members work on a project, based on an hourly rate for each skill set or the actual salary of the team members.

Major Overall Risks

- Document risk process - identify and assess known project risks.
- Advanced risk management techniques.

Project Issues

- Document issue management process - identify and assess known project risks.
- Reference Issue Log (if applicable).

Change Management

- Describe your change management process.
- Implement change process.

Communication Management

Describe the system of communications and the project performance documentation that will be provided to the various stakeholders.

- Define procedures for interacting with your client. How will s/he contact you?
- Who on your team is the primary contact (i.e. team leader/manager)?
- How will you contact your client? How do you gain access to interview end-users?
- How often will you provide written and/or oral reviews?

- Does your client have a specific format for project status reports?
- Who makes the go/no-go decisions, including changes in project scope or requirements?
- Does your client expect you to adhere to any particular development methodology or standards?
- How will the final review (user acceptance review) be conducted?
- Be sure to schedule well in advance a mid-point (i.e. Spring Break) and a final review time and date with your sponsor and end-user representatives.

In summary, your purpose in this section is to outline the structure of your client interaction, whether by phone, email, in person, or in formal reports. See the sample communications plan below.

Sample Communications Management Plan

The purpose of this document is to identify and manage the communications required to successfully complete the project.

ID	Title	Description/Content	Audience	Medium	Frequency
01	Milestone Report	Major Milestones	Project Team Department Manager Key Stakeholders Project Sponsor	Email	Weekly
02	Project Plan	Deliverable Dates	Project Team	Email	Ad-Hoc (See 01)
03	Meeting Minutes	Decisions, Action Items	Project Team	Email	As Held
04	Brief Status Meeting	Progress Reporting, Issues, Action Items	Project Team	Informal Verbal	Weekly
05	Issues	Issues	Select members of Project Team (at times full team)	Teleconference	Ad-Hoc (Few Hours Notice)
06	Progress	Progress	Project Team	Teleconference	Weekly
07	Customer Correspondence	Any Activity/Question	Business Development Manager	Email/Verbal	Ad-Hoc/Weekly Status

Related Products and Deliverables

Document known project dependencies with other groups within or outside of the organisation, to ensure the project is not exposed by other business processes.

Approvals

Use this section to capture approval signatures, from project stakeholders.

Project Agreement Approval Form		
Project Name: I have reviewed the information contained in the Project Plan dated _____, and agree to the baseline commitments specified in it.		
Name, Project Manager	Signature	Date
Name, Project Sponsor	Signature	Date
Name, Title	Signature	Date
Name, Title	Signature	Date
Name, Title	Signature	Date
Name, Title	Signature	Date

Attachments

Include in this section pointers to pertinent documents such as:

- business case or plan that initiated the project
- notes
- related documents
- team charter - should be included as a separate document with project plan
- project binder (this contains all the supporting materials to your project plan)