# **Top 10 Project Plan Templates**

# **Team FME**



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## Introduction

The role of a project manager has become more complex and the breadth of skills an individual must have to succeed has expanded considerably. You can no longer just be a subject expert you must have a working knowledge of key management skills.

Being able to adapt generic templates to suit the needs of your specific project is an essential part of any project managers '*tool kit*'. These templates offer you the following benefits:

- Save you time because you are not starting with a blank sheet.
  This ensures that you are productive and efficient.
- Easy to modify and adapt to suit the exact needs of your project.
- Provide a simple checking mechanism when writing your project's functional area management plans. This ensures that you don't forget anything vital.

Project managers must have excellent written and verbal <u>communications</u> so they can express themselves competently when discussing:

- <u>Financial</u> principles and statements
- <u>Strategy</u> and planning
- Project Management
- Leadership and productivity
- <u>Sales</u> and <u>marketing</u>

Being able to express your decisions and requirements in the language of each discipline above has become a basic requirement of any manager.



Knowledge in the form of market intelligence is the life-blood of organizations and managers are constantly asked to supply such data to aid in the analysis of the internal capabilities of an organization.

Our FREE management resources will help you acquire the level of such skills needed to perform your role effectively.

Whether you need the detail of an eBook, the guidance of a checklist or template to help you perform and manage a specific task <u>www.free-</u> <u>management-ebooks.com</u> website has a free resource you can download onto your PC, Mac, laptop, tablet, Kindle eBook reader, iPhone or Smartphone.

## Top 10 Templates for Creating Project Management Plans

The following ten templates are the most popular downloads requested on our website and each one will help you to perform your role more efficiently.



You no longer have to create your own template or wonder if you've thought of everything you need to do to perform a task the knowledge you need is at your fingertips.

- 1. Project Management Plan Template
- 2. Change Management Plan Template
- 3. Configuration Management Plan Template
- 4. Cost Management Plan Template
- 5. Procurement Management Plan Template
- 6. Quality Management Plan Template
- 7. Requirements Management Plan Template
- 8. Risk Management Plan Template
- 9. <u>Scope Management Plan Template</u>
- 10. Schedule Management Plan Template

Before each template there is a description of how it will aid your performance and some background information to clarify its purpose if you are using it for the first time.

This list does not include all the essential project management plans you need to produce. Planning project communications management is a significant functional area of any project and has its own free eBook dedicated to '<u>Managing a Project Team</u>' (click this link to download your free copy).

The complexity of your project will dictate how many facets make up your project <u>communications management plan</u>. For example, does the size of your project necessitate a separate management plan for dealing with the wide variety of <u>stakeholders</u> and <u>human resources</u> required for the project team?

#### **Project Management Plan Template**

This <u>Project Management Plan</u> template will help you produce a plan that ensures you have covered every aspect necessary for your project to be a success.

The importance of this plan cannot be over-emphasized and as project manager you must take sufficient time to make sure that each section is described in detail so that everyone on the project team knows exactly what is expected.



If you are in charge of a small project, you can use this plan template as a self-contained planning document. However, if you are running a larger project it makes more sense to create a series of subordinate plans for each functional area, including scope, budget, schedule, risk, quality, human resources, etc. Use your own judgment about which sections to use and how much detail to go into.

It is inevitable that updates from approved changes during the project may significantly impact parts of this document and will provide greater precision with respect to schedule costs and resource requirements. A working version will need to be released to the project team at some point so that they know what they are supposed to be doing at any point in time. This plan contains all the key information and plans (listed below) that enables you to manage, monitor and implement your project successfully.

- 1. Project Management Approach
- 2. Human Resources (HR) Management
- 3. Communications Management
- 4. Scope Management
- 5. Schedule Management
- 6. Cost Management
- 7. Quality Management
- 8. Change Management
- 9. Risk Management
- 10. Supplier and Contract Management

Download your own copy of the Project Management Plan template.

#### **Change Management Plan Template**

The <u>Change Management Plan</u> template allows you to control, manage and monitor change requests that occur throughout the life of a project. This plan defines who has the authority to approve the change requests and sets up a process of how a person can make a change request.

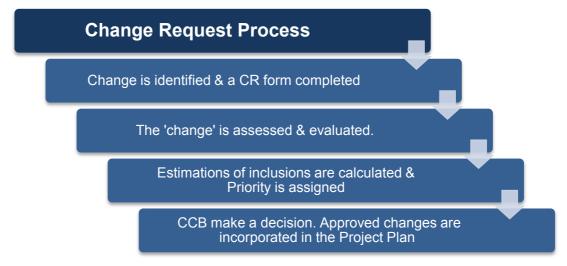
It defines the information and justification that is required for each change. Its intent is to ensure that only 'considered' changes are present to the CCB (Change Control Board) or team responsible for changes as defined in the project plan.



Its purpose is to minimize 'scope creep' by allowing only approved changes to be implemented so any alterations to the project schedule, resources, budgeting, risk assessment or quality control are negligible. Without such a process the essence of a project can change beyond all recognition and fail to meet its objectives.

This process must form part of the initial planning of the project and be agreed and followed by all key personnel involved in the project, from the project team to stakeholders. Project changes must add real value to the performance baselines and project plans they cannot be 'whims' or 'nice to haves'.

It is up to the project manager and the project sponsor to communicate accepted project changes to the stakeholders and in such a way that meets their expectations despite certain project deliverables having changed. The nature and frequency of communication will be defined in the communications plan. The change management plan then goes on to describe the principles and ethics that form part of its process. It states what the organization will achieve by adhering to this process ensuring no detrimental impact occurs as a result of an approved change.



The interests of stakeholders must be taken into account at all times and plays a significant role in the decision making process as to whether or not the change is approved. Once the CCB has approved a change request (CR) all relevant project baselines must be amended accordingly and communicated to all necessary individuals and organizations.

The change management plan ensures that all suggested changes are logged, assessed, monitored and managed to ensure the project remains on target and to budget. It is also responsible for consolidating this change into the performance measures, polices and procedures that currently exist. This will ensure that any barriers within the organization are minimized if not removed so that the benefits can be attained.

Download your own copy of the Change Management Plan template.

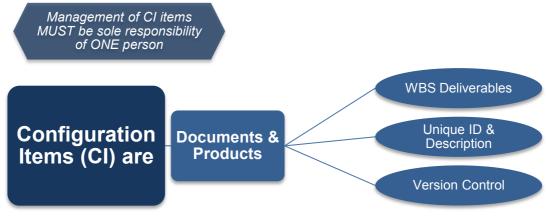
#### **Configuration Management Plan Checklist**

This <u>Configuration Management (CM) Plan</u> checklist will help you to explain to the stakeholders how configuration management will be managed for their project. It lists the CM tools that will be used to endorse success and describes the sections and contents you need to produce this plan as well as who it will be circulated to within the project personnel.



The purpose of the CM plan is to ensure that the correct document is circulated in a timely manner to those who need it to perform their role and complete the deliverables they are accountable for.

Projects are a complex 'living' entity that evolve as they mature adapting to circumstance in a way that ensures their 'survival' i.e. attainment of the project objective. This evolutionary process applies to both project documentation and the project deliverables.

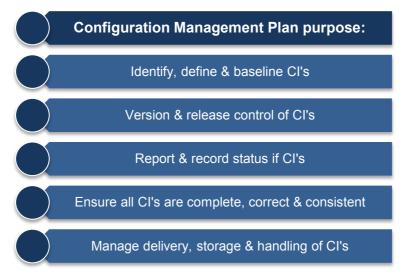


Configuration items (CI's) are all the documents and products that are required to administer and control the configuration management method used in a project. They will be detailed in its own register and each item

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assigned a unique ID and description. Day-to-day responsibility of configuration management is most effective when only a single person has responsibility for it. This enables each item to be monitored and tracked throughout the length of the project.

Projects often have complex relationships that intertwine and this interrelational should be reflected in document management. A configuration management plan defines the procedures that enable the right version of a document to be distributed appropriately to all pertinent product components and project information. It also ensures the accuracy of all documentation, which is essential in all projects what ever their size.



Therefore the purpose of the configuration management plan as applicable too most projects are shown in the above diagram. Your plan will need to reflect the culture of the organization and the particular nature of the project itself.

Configuration management is a method for administering an evolving, and often interrelated, set of products and project documentation. The application of effective procedures should ensure the accurate and up-todate documentation and distribution of all relevant product components and project information. The challenge when developing a CM plan is to create a process that is suitable for the size and scope of the project. The plan must avoid being seen as overly bureaucratic, time consuming or overly complex system because if this is the case it can add significant costs and time delays.

Download your own copy of the Configuration Management Plan template.

#### **Cost Management Plan Template**

The <u>Cost Management Plan</u> template provides you with one of the most important plans for a project. Without this plan costs can quickly become unmanageable and escalate out of control resulting in the project being prematurely closed.

Costs for a project must be planned and supported by its stakeholders and project sponsor. Then one of the project manger's most important tasks is to monitor, control and manage the cost base throughout the life of the project to ensure that it delivers the end product within the approved budget.



Cost management is one of the most critical areas and responsibilities for a project manager. Poor management of project costs is often one of the key factors behind projects failing to attain their objectives. Without careful planning, monitoring and management costs can easily take on a life of their own and cause the project manager ongoing problems.

Knowing how to produce a cost management plan that enables accurate forecasting and places proper controls on costs is essential for a project manager. It also provides clear instructions to others involved in the project team as to how costs will be managed.

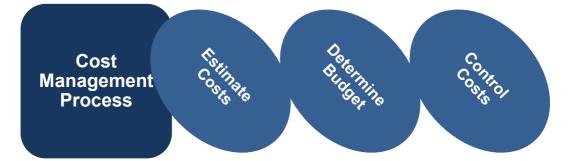
The complexity of cost management increases in relation to the number of resource contractors used when outsourcing aspects of the project deliverables. This plan plays a critical role in addressing such issues because it defines and documents how costs are planned for, managed,

controlled and expended during its life cycle. For example the activity cost estimates are a crucial input to several of the other management plans that use the activity resource requirement details in their creation.

The project plan and the project charter are two of the most significant inputs required in the production of a cost management plan. These documents along with those describing the project environment and organizational processes enable you to define the way costs need to be managed for a specific project.

This plan will require considerable input from experts who have much greater knowledge on budgeting for this type of project and they will be aware of different options available to the stakeholders with regard to how the project itself is funded as well as how to finance the resources required.

It is important that the risks associated with each of the options being discussed are fully explored before any decision is made. Each option is also likely to impact the project schedule and this must be taken into account when putting together final costs for the project plan.



The scope and schedule baselines are used to provide an estimation of the cost for each activity. Each cost estimate must have an explanation on how these figures have been calculated along with any assumptions or constraints. These are then discussed and a cost performance baseline is approved and agreed upon to determine the final project budget.

Throughout the whole project life cycle the way in which costs are monitored, controlled and reported on is defined in the final process of cost management. The result of this part of the process is to create the work performance measures by which overall success is judged. A common technique used in this area is Earned Value Management (EVM) where your forecast of expenditure is compared to the projects actual costs.

The cost plan defines how the costs on a project will be managed throughout the project's lifecycle. It sets the format and standards by which the project costs are measured, reported and controlled. This plan identifies who is responsible for managing costs and who has the authority to approve changes to the project or its budget. It also specifies how cost performance is quantitatively measured and details report formats, frequency and to whom they are presented.

The Work Breakdown Structure (WBS) is the basis for the cost management plan because the costs are totalled or "rolled up" from the costs for the individual work packages in the WBS.

Download your own copy of the Cost Management Plan template.

#### **Procurement Management Plan Template**

The <u>Procurement Management Plan</u> template outlines the framework that you will use throughout your project to procure the necessary resources. This plan defines the preferred type of contract and the risks associated with each of the procurements, as well as how they will be managed.



The plan outlines how such tasks are performed and becomes a component of the project plan. It describes how all of the other procurement management processes are to be carried out.

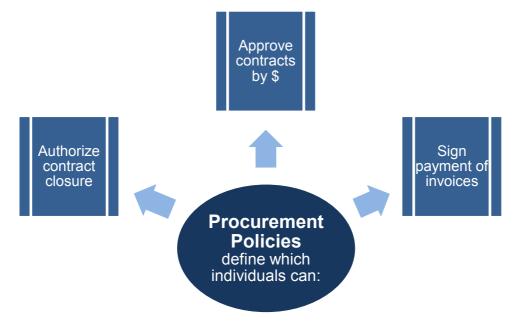
- What will be procured for the project
- Type of contract used
- How they will be selected & managed
- · How their performance will be measured
- How procurement risk is to be managed.

With every aspect of a project has an element of risk and the procurement plan is no exception. It describes how risks are identified, assessed and managed within the constraints of the procurement processes. These risks will be include in the project risk register to ensure that all relevant threats are identified and documented in a central repository.

Deciding on the type of contract best suited to the project and its desired resources includes stating contract deliverables in precise terms and the

metrics that will be used to measure contract performance and ensure it meets the needs of the project.

An important part of procurement is the determination of cost levels incurred in each contract and the careful monitoring of contract fees to ensure the overall project budget is not exceeded. It outlines how these contractual relationships will be managed from inception to the closure of the final contract.



This plan uses a specific skill set and many project managers will bring in a contract specialist or ensure someone on the team has the contractual and legal knowledge to efficiently conduct the necessary procurements. It outlines 'who' within the project organization has the authority to conduct, approve and close contracts within a defined level of spend.

The majority of project managers act as an 'overseer' for all procurement activities related to a their project and will work closely with the Project Management Office (PMO) to finalize the procurement list. This list will then be passed on the purchasing department who then determines the best way to acquire the resource and start the process of supplier selection and contract negotiation. The procurement of all resources must correlate with the project schedule to ensure items are available as needed to complete the specified work packages. Every procurement involves an element of risk, whether this is inherent in the type of contract, historic relationship with the third party or the uncertainties of associated with the scope or schedule.



The key to success is to identify and plan to mitigate their occurrence or impact on the provision of the service. In many organizations contractual decisions are made by a 'Contract Review Board' (CRB) and the sort of criteria they will judge suppliers suitability on include:

- Past performance
- Quality of final deliverable
- Ability to meet required deadline date
- Outsourced Cost Vs. In-sourcing

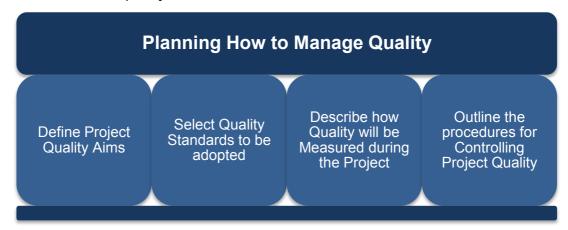
The project manager will be part of the final decision to ensure that she or he has the resources they need, when they need them. This naturally includes who within the project team on a day-to-day basis will manage the supplier and all aspects relating to their delivery, ultimately responsible remains with the project manager.

Download your own copy of the Procurement Management Plan template.

#### **Quality Management Plan Template**

This <u>Quality Management Plan</u> template enables you to communicate to your stakeholders, project team and third parties the importance you place on producing quality products and services. This plan ensures that you prepare a detailed and well thought out approach to quality management.

It enables you to clearly indicate the quality requirements and boundaries of acceptance for all products and shows how you plan to implement quality assurance and quality control.



Quality is a key part of retaining market share and improving ones competitive advantages. Quality management is a significant part on any project planning and formulates the boundaries of acceptance your team will tolerate for the deliverables, products and services they must use during the project.

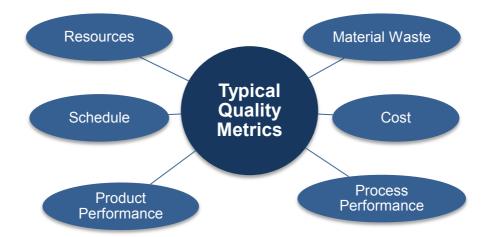
Many organizations have to meet strict compliance demands and regulations and these industry standards must form part of the project's quality measurement and control. Quality affects every aspect of the project and emphasizes the need for it to be properly measured, managed and controlled at all times.

Many successful project managers ensure that the quality aspects of their project have their own plan that defines the procedures, policies and processes to be used for the duration of the project. This quality plan

explicitly explains how it will be implemented for this project. The depth of this explanation will vary according to the individual project requirements.

The approach to quality management will match the needs of the organization and the project and a full description is included in this plan. It is important that the project manager gets the approval from all stakeholders and they become familiar with all quality facets. They must also understand that no one person's interest or influence will compromise quality.

One of its main purposes is to minimize the amount of rework and wastage both in terms of cost and time. Many projects appoint a quality group manager to work with the project team and be responsible for defining what metrics will be used to assess quality, when and how these measures will be taken and how the results will be analyzed and reported.



It is important to ensure that everyone involved on the project team and the quality group understands that they can highlight quality issues that will follow a predefined review process to judge whether the improvement adds more value to the project than its implementation cost. To ensure all lessons are learnt within this area, the plan makes specific reference as to how such issues are documented throughout this submission and evaluation processes.

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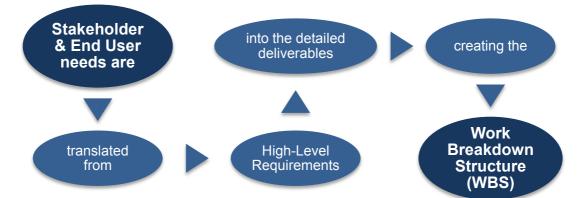
Successful project managers understand the importance quality management plays in communications with their stakeholders and see this plan as a significant tool in engaging this group of key people in this management process.

Download your own copy of the **Quality Management Plan** template.

#### **Requirements Management Plan Template**

This <u>Requirements Management Plan</u> template will help you to record and define all the project requirements whether they are product or project based. It provides a structured and documented framework that is fundamental to the management of project scope.

This plan defines how project requirements are collected, analyzed, monitored and managed. It ensures that all requirements are recorded in a structured manner avoiding omissions and provides a tool to ensure the right requirements are available in a timely and appropriate fashion.



Projects are evolving entities and as such changes are inevitable and requirements must be well planned and managed so that these changes appear as seamless as possible to those in the project environment. There are several key documents that are essential to the understanding of a project's requirements and how best to manage them to achieve success. They are:

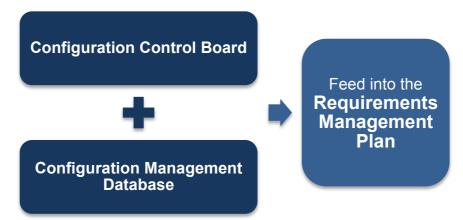
- The project scope management plan
- The project charter

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- The stakeholder register
- The stakeholder management plan

It is by translating the needs of the project's sponsor, its stakeholders and end users/customers into requirements that enables the work breakdown structure (WBS) to be created and the project deliverables defined. The requirements management plan describes how the project requirements are taken from a high-level description to a detailed definition. A prerequisite of the requirements plan is the project scope management plan. The latter includes the quantified and documented needs and expectations of the sponsor, customer and other stakeholders.

One of the critical responsibilities of the project manager is to make sure everyone on the project team adheres to the reporting structure defined in this plan. When team members provide accurate and up-to-date reports on the status of requirements issues and concerns will be highlighted enabling decisions to be made and any changes as the project progresses to be accommodated.



It is essential that the process for discussing and approving changes involves all individuals or groups that have a stake in the project and is coordinated with the configuration control board. The requirements management plan plays a key role in outlining the approach being taken for the managing the projects configuration and a key input into the configuration management database.

A vital part of this plan is the evaluation and analysis of requirements and assigning a level of priority to each requirement so that if cuts or changes have to be made all those involved have a clear understanding of the practicalities entailed. Stakeholders have a major contribution to make in this process because they are unlikely to have a complete picture of the project's impact, they will only be familiar with their own area or specialization. The constraints placed upon any project will form a key part of the decision making process because they highlight the impact of cuts in one area on other areas.

This ability to reflect the opinions and needs of stakeholders in the defined project requirements enables greater acceptance of the project and its ultimate approval. This process of collecting requirements provides the basis for defining and managing the project scope along with the product scope.

Regardless of the method you use to collect your requirements for it to be an effective use of your time it is essential to carefully plan what you want to achieve and explain in concise terms what you want from participants. It is essential to guard against the tool becoming hijacked by individual concerns not connected with the project.

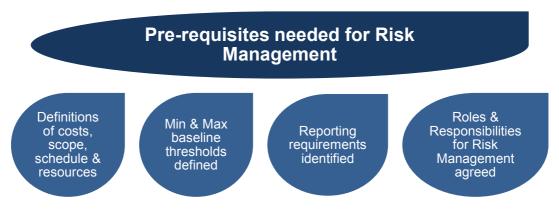
Initially project requirements will start out being described in high-level terms, becoming more detailed as knowledge and the project progresses. Requirements must be easily testable, traceable and measurable before they can form the necessary project baselines. They must also be consistent and acceptable to its stakeholders.

Download your own copy of the <u>Requirements Management Plan</u> template.

#### **Risk Management Plan Template**

This <u>Risk Management Plan</u> template enables you to put together a comprehensive and well-evidenced document as part of your project. This area of project management requires you to co-ordinate the knowledge and interests of various people involved with the project your team, your stakeholders and your subject matter experts.

The template guides you through the contents of each section of the plan and ensures that you create a risk log and risk register as appendices. This management plan needs a solid foundation of project data that provides sufficient structure allowing the probability and severity of risks to be quantified.



The management, monitoring and controlling of project risks forms a critical part of any project management, but it cannot be planned for until the project has a degree of structured information on which to base its own management plan.

The risk management plan and its associated documents (risk log and risk register) form some of the most critical tools for a project manager. It is only by careful identification and weighting of risks that could affect his or her project that they can prepare and plan for what to do if they occur.

When a project manager has a clear and concise understanding of the most probable risk he or she can work with others to plan how to alleviate the expected impact and severity on their project. It is essential that all

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interested parties understand the difference between the probability of a risk occurring and its likely impact on the project if it does become a reality.



At the start of this exercise it is vital that you recognize 'who' the experts are you should, as project manager, involve in the identification of potential risks. These individuals will come from a variety of sources including your own senior managers, subject matter experts and project stakeholders.

This process creates the risk breakdown structure (RBS) a vital document that outlines the structure and procedures to be adopted during the project to manage risk. It lists the defined risk categories for the project and describes how the 'Probability and Impact matrix' will be calculated and presented. It enables stakeholders and other readers of this document to easily distinguish each category and its related subcategories including their causes.

Any changes in the risks associated with a project must be regularly communicated to stakeholders and the project sponsor to ensure that their risk tolerances are up-to-date and the risk management plan defines how, when and who will receive such reports.

This plan also describes its own resource requirements and how these will be budgeted for, including the day-to-day risk management and the associated costs incurred if actions need to be taken when a risk is realized.

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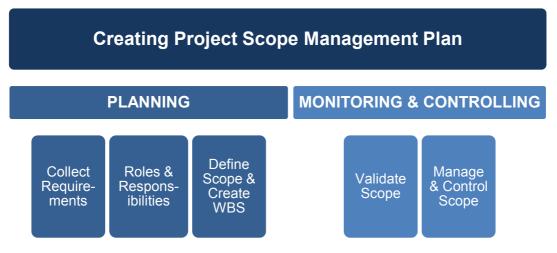
It is likely to include a contingency budget for the project risk's 'most likely to occur' so that potential costs for responding to that risk can be included in the overall project budget.

Download your own copy of the Risk Management Plan template.

#### **Scope Management Plan Template**

This <u>Scope Management Plan</u> template is designed to enable you to produce an effective scope management plan. All essential details and descriptions of what the exact nature of the project is are contained in this management plan. It also defines how end user requirements will be translated into deliverables and their associated workable chunks.

This plan ensures that everyone has a common and thorough understanding of the projects overall objective and how this need will be met. It defines the role and responsibility of every individual linked to the project and the communication that must occur between different parties to ensure it success.



Scope management is a vital skill for any project manager. It is relatively easy for a project objective to be set, but success depends on two things. First, 'everyone' (team members, stakeholders, third parties etc) must have a common understanding of how the project defines and delivers its end product or service. Secondly, all communications must be structured and appropriate.

The scope management plan ensures that all those involved in the project are appropriately communicated with and before the project starts have a comprehensive understanding of what the project means to them and the organization.

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The scope plan enables the project manager to control and manage the definition of what is and is not included within the scope of the project. In addition to this plan there are several other key outputs of this process that are essential tools for any project manager, they are:

- Requirements document
- Project scope statement
- Work breakdown structure (WBS) & the WBS dictionary
- Acceptance deliverables
- Change requests.

By reading the project charter and stakeholder register a project manager will gain a thorough appreciation of the project obligations and be able to write the requirements management plan. Then approval can be sought for the scope statement, usually referred to as the scope baseline.

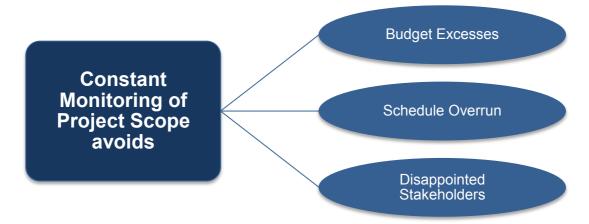
It is essential at this stage that stakeholder's expectations are set appropriately as part of this process and that they clearly understand the purpose of the project scope and do not confuse it with the 'product' scope.

 Project scope defines the 'work needed' to deliver a product, service or result.
 Product scope describes the 'features and functions' of the product, service or result.

Once the scope has been defined the next task to be completed is to divide the project deliverables into practical chunks of work and define them in the resulting work breakdown structure (WBS) dictionary. The decomposition of project deliverables in this way is based on the assumptions, constraints and exclusions that have been agreed.

Using the hierarchical structure created by WBS makes estimating costs and activities a more accurate process. It is essential that you have a thorough understanding and appreciation of your project requirements, including the acceptance.

Another key aspect of scope management that is essential to smooth project day-to-day operations and is defined in this plan is the way to validate and control the scope.



Once the scope has been defined you need to gain formal acceptance of the project deliverables by the stakeholders and on their agreement your project scope is now approved. Any changes or alterations that arise after this sign off of the scope must adhere to your project's change control process as described in this plan.

Many organizations have a Change Control Board (CCB) that consists of members of the project team that review the change request (CR) forms and decide which are to be approved and those to be rejected. Once a CR has been approved your scope baseline and any other appropriate project baselines must be updated and a new version of the project management plan issued.

It is essential that you have strict controls over the change request process, other wise you could suffer from 'scope creep'. This is where unacceptable or unqualified risks get introduced into your project often causing project failure in one form or anther e.g. missing key milestones or over spending against your budget.

Being able to efficiently manage the scope of a project is an essential skill for any project manager. To control a project scope you need to have work performance data (current status, timely nature, cost component), a project plan and documentation of project requirements.

Download your own copy of the Scope Management Plan template.

#### **Schedule Management Plan Template**

This <u>Schedule Management Plan</u> template allows you to create an appropriate schedule management plan in sufficient detail for your project. This document forms the backbone of how your project's schedule will be developed, monitored, and controlled. It defines the criteria and activities as they relate to each facet of project management.

It defines for each project resource how it will be measured, the guidelines of performance measurement, level of accuracy and control thresholds that are acceptable for this project. The work breakdown structure (WBS) document plays a key role in producing the schedule management plan as it defines the manageable chunks of work required for each deliverable once approved these create the project scope baseline.



This plan outlines the precise nature and objective of the project explaining how it benefits the organization. It also defines and documents any project assumptions, constraints and exclusions that have been agreed upon and have been taken into consideration in the project decisions making process for this area of project management.

It also defines which individuals must be involved in this process and states whose approval is needed to progress the project. The schedule management plan guarantees that everyone linked with the project has the same understanding of the project's purpose and the benefits it brings to the organization. In order to create the project schedule there must be a clear and detailed understanding of the end-users' requirements. The schedule plan defines what and how the end product or service is created and whose approval is required for this plan to become part of the project documentation.

There are several aspects to developing a project schedule, the project plan and the project charter are essential. But you must not forget to incorporate the cultural influences, policies, procedures, guidelines and processes of the organization.

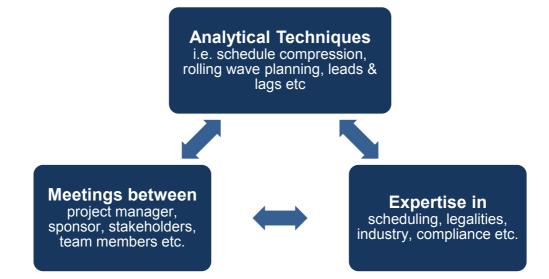
Communication plays a key role in a project's ultimate success and the schedule management plan is no exception. It clearly states what reports should be produced, how often and to whom they must be distributed to. These communications and reports have a crucial part to play in ensuring the end product meets the expectations of the project stakeholders and the organization.



The schedule management plan defines the roles and responsibilities as they relate to the project time management. The plan outlines the roles of the project manager, project sponsor, relevant stakeholders and certain members of the project team have in the definition of individual work packages.

A significant amount of this management plan is devoted to describing how changes to the project schedule will presented, evidenced, assessed and

approved. All projects will have schedule milestones that are defined within the description of how this knowledge area will be managed.



Good project managers will use a combination of three tools shown above when creating a schedule management plan. Due to the complexity and specialization that frequents most projects the need to call on subject matter experts is paramount.

Considerable skill and experience is needed to create a sequence of project activities that are able to use the resources and time in the most effective way to ensure a projects success. Being able to identify the exact nature of relationship between activities within each work package and recognize any dependent activities is essential when defining a project schedule.

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