



Project Plan

Directions: *This project plan is meant to help you as the project manager organize, drive communication, and ultimately lead this project to success. For some projects, this will be snapshot of the project and will link to other needed documents and for other projects this will be the only document. Please refer to and update the guidelines of this document to ensure everyone is clear on how it will be used in this project. This document isn't meant to be used as a linear document and you may need to work in a nonlinear fashion to advance the plan to the approval stage. The elements in this project plan include:*

1. [Project Name](#)
2. [Project Manager](#)
3. [Result](#)
4. [Business Requirements](#)
5. [Timeline and Budget](#)
6. [Resources](#)
7. [Project Barriers](#)
8. [Change Log](#)
9. [Major Milestones](#)
 - a. [Flow Chart](#)
 - b. [List](#)
10. [Guidelines](#)
 - a. [Project Specific](#)
 - b. [Company Specific](#)



1. Project Name:

2. Project Manager:

3. Result of Project: Describe what this project should accomplish in 1-3 sentences. Be sure to be as specific as possible, but to also connect to the heart and logic of why this project is important to the business.

This project will.....

4. Business Requirements: In defining the business requirements you need to define what the wants and expectations are at the end of this project. These should include deliverables, which are the tangible and intangible take away of the project, and what this project must accomplish. Basically at the end of the projects this will be used to judge if the result of the project was met or not. Before defining business requirements ensure you have priority levels set. It may be that some requirements are “wants’ but if we can’t achieve them based on elements like: time, budget, resources, etc., the project will still be successful. Priority Levels:

- o 1: Must Have – Project is not successful unless these are met
- o 2: Needed, but could be in another phase – Project should try to accomplish these and should always discuss as possibility. We want to ensure that the solution we create won’t make it harder to achieve these in future.
- o 3: Nice to have, but not vital to project success - These will not be used to determine the success of the project.

#	Requirement	Priority	Date Completed
1			
2			
3			
4			
5			



5. Timeline and Budget: *If you cannot set a hard timeline or budget for this project then ensure that you set guidelines below. These should be compared to the guideline section and a discussion with manager is needed if they conflict with other guidelines. Update the guidelines after any decision has been made with manager.*

Timeline:		Budget	
To be completed by:		Fixed Budget:	
Timeline is not fixed	<ul style="list-style-type: none"> • Send weekly reports to <ul style="list-style-type: none"> ○ Manager • Will create and maintain a weekly schedule with estimates of next milestones 	Estimated Budget:	
		Authorized to Spend:	

6. Resources: *What are the additional resources that are needed for this project and when? If the resource will impact the budget be sure to note that cost. These can include resources the business has, but you currently do not have access to such as software, equipment, or even word documents to change.*

Resource	Timeframe	Added to Budget

7. Project Barriers: *This section should be updated before approval and as the project progress. Identify any known or new barriers that could stop this process. These can be outside issues, internal issues, or even barriers caused by your own personality. It’s best to be open and honest in this section so that you can brainstorm and find solutions before your run into the barrier. The notes will also help you see what worked and didn’t work for future projects.*

Barrier	Ideas for overcoming	Notes
<i>Vendor for X tends to be behind schedule often.</i>	<ul style="list-style-type: none"> • Pad timeline for their deliverables by 2 days • Email two days before due date to check in 	<i>Found that communicating with X works the best</i>

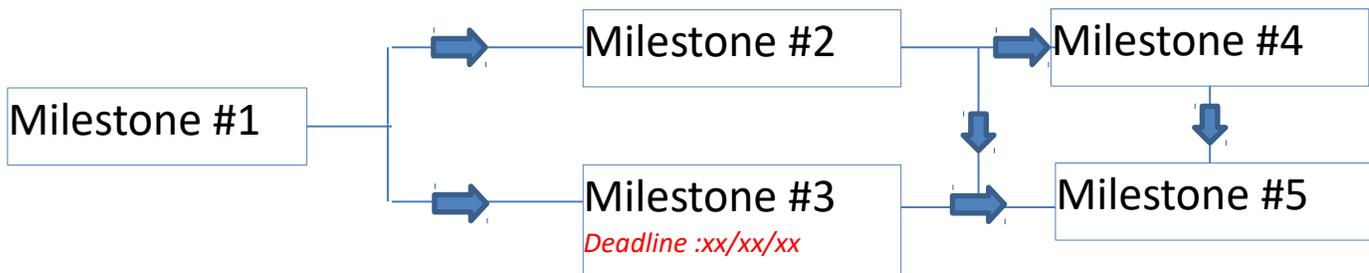


8. Change Log: After the project plan has been approved then you need to log any all changes to the project plan. These should be logged as they occur and not at the end of the project. The guidelines section should be updated to include the date of when this happens. This may seem like an unnecessary step, but the information is invaluable to the business. It helps keep all team members in the loop of what is happening AND can provide us with information that will help us with future projects.

#	Change	Notes	Date
1	Changed priority level of Business Requirement #3 from 1 to 2.	We discovered that this feature is incredibly expensive in all platforms we have looked at. While initially we thought it was a must have, after considering price we moved it to something we can add down the road.	Xx/xx/xx
2			
3			
4			
5			

9. Major Milestones: Create a flowchart and a list of the major milestones for this project. Major milestones should include points where feedback is needed, when business requirements are met, where projects might be held up as the milestone depends on something else, when decisions must be made, or is considered a major event in the project.

Flow chart: Using PowerPoint to create the flowchart can make it easier. You can then paste or link to that document. In the flowchart use lines to show how milestones are connected (how information flows, and what milestones depend on others, etc.) In projects with strict timelines or budgets you may add deadlines or budget figures under the milestone name. Or where arrows are add time that milestone should take to complete.





List: Your milestone list again shows the milestones, dependencies on other milestones to start, timeframe (can be used to list deadlines OR time for completion), and ties back to your business requirements. This helps ensure that you can track and monitor progress of each business requirement so that at the end of the project there are no surprises.

Milestone	Depends on	Time Frame	Business Requirement
Milestone #5	2,3 & 4.		Fulfills 1 & 3

10. Guidelines: Every project should have clear guidelines that a project manager uses to update their team and the project plan. Without clear guidelines a project manager is left to guess at who should be told what when it comes to the project. Guidelines should be divided into companywide guidelines and project specific guidelines.

Project Specific Guidelines: If a project specific guideline conflicts with company guidelines then the project manager should meet with their manager and discuss how to proceed. This change should be documented in the change log.

- Project Manager will create a first draft of this project plan from notes when project was assigned to them from manager.
 - A First Draft Meeting should be scheduled within
 - Meeting should include:
 - A second draft will be completed by:
 - Need to be approved by:

- Final Approval Date for this plan was given on

By:

- Any changes that mean that Business Requirements, Timeline, Budget, or Milestones will not be met should be immediately reported to the project manager’s manager as soon as they are



identified via email. The project manager should schedule a follow up meeting within 2 business days if no other schedule meeting is available to discuss these changes.

- Any other changes should be captured in the change log and a weekly email recapping the change log should be sent to:

Company Specific Guidelines:

- If any of the areas in this plan grow too large a spreadsheet will be created with the same information and linked to via hyperlink in the appropriate area of this plan
- Project Manager will add this project to project list and report to manager weekly during employee development meeting on progress
- Project Manager will note and update any changes to this document after Approval Date
 - Any change made to this document or supporting after this date should be color coded or have an * by it so we know to look at the change log for details.
 - If important elements of the project plan are unknown and need to be discovered and elaborated on as part of the project add a project specific guideline to indicate when the project plan is approved. This date should signal when any changes to the elements of the project plan need to be documented in the change log.
- Any deliverables that will be seen by our customers/prospects/centers of influence must:
 - Have two sets of eyes – reviewed by at least two other people
 - Include our website and phone number
 - Have our logo