|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Project Management Plan | | | |  | | |
| Project Name |  | Id |  | | Version |  |
| Project Manager |  | Email |  | | Phone |  |
| Project Sponsor |  | Email |  | | Phone |  |
| Elevator Pitch  *Summarise the project in three short sentences.* | This project is about…  It’s important to do because…  When it is finished… | | | | | |

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*Note: see RADICAL Register for Risks, Actions, Dashboard (Schedule, RACI, HR Allocations, and Project Cost Estimate), Issues, Changes, Assumptions/Constraints and Lessons Learned*

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Integration

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| --- | --- | --- | --- | --- | --- | --- | --- |
| Project Objective/s | | | | | | | |
| Objective/s  *What must be achieved, before the project closes, in order to call the project “successful”?* | | | | | Measurable Success Criteria  *Evidence that the objective has been achieved to clarify the line between success and failure. Quantifiable criteria that can be (easily) measured before the project closes.* | | |
|  | | | | |  | | |
| Governance Structure | | | | | | | |
| *Individuals/groups that will authorise the project, direct the actions of the project manager, provide funding, decisions, & resolve escalated risks/issues.* | | | | | | | |
| Governance Role | Name of person performing role | Email | Phone | Responsibilities (e.g. attend Steering Committee meetings, facilitate funding, support) | | Communication needs (Status Report, meetings) | Comments |
|  |  |  |  |  | |  |  |
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| Integration Management Plan | |
| Project lifecycle What will be the phases of the project lifecycle? Phase gates (e.g. “G1”) are checkpoints at which the project’s governance structure (e.g. Sponsor) may review the project, confirm its continued viability, and make a “Go/No-Go” decision. | Gate reviews and the key requirements for phase/stage completion as per client requirements and project objectives:   * G1 = Phase Gate 1 Approval of Project Charter required before the project may proceed to the Planning Phase. * G2 = Phase Gate 2 Approval of Project Plan required before the project may proceed to the Implementation Phase. * G3 = Phase Gate 3 Approval of final Status Report required before the project may proceed to the Closure Phase. |
| Standards, regulation & legislation  *What internal project management standards, methodologies, polies and protocols must be complied with during the project? What external regulations and/or legislation applies to the project (e.g. WHS, POEO, Privacy, etc)* |  |
| Reviews & revisions of this PMP How frequently will this document be reviewed and updated to reflect emerging details about the project? Who is authorised to approve updated versions? To what extent is the project manager authorised to change the content of this document before triggering Integrated Change Control and requiring a review and approval from the sponsor/steering committee? |  |
| Integrated Change Control How will proposed changes be identified, analysed, reported, accepted/rejected, integrated into the PMP and communicated to affected stakeholders? What documentation is required? – e.g. Change Log |  |
| Status Reports What is the process for reporting on project progress and performance? What documentation/templates must be used? How often will Status Reports be sent? |  |
| Closure Describe the process, activities and approvals required to close and review the project. What documentation is required? |  |

Scope

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| --- | --- |
| Scope Management Plan | |
| Scope management concepts, processes, and techniques to be applied e.g. *How will the project be scoped? How will requirements be gathered and who should be involved? How will scope be validated (accepted)?* |  |
| Sub-plans, tools and templates  e.g. Scope Statement, WBS, Requirements Traceability Matrix, Change Request Template, Change Log |  |

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| Scope |

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| Deliverables (inclusions) List the deliverables (products, services and results) that are included in the scope of work for this project. | Acceptance criteria  *Test/measure of ‘good enough’* | Verified Date on which the deliverable was deemed acceptable by the team | Validated Date and person who accepted the item on behalf of the sponsor/owner |
|  |  |  |  |
|  |  |  |  |
| Out of Scope (exclusions) | | | |
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| Work Breakdown Structure |

Delivery Team & Governance Structure

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| Organisation Breakdown Structure (OBS) | |
| *What are the channels through which authority and financial delegation flow down to project manager, team leaders, suppliers, and team members; and through which status reports, information, and issue escalation flow back up?* |  |

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| HR Management Plan | |
| Forming the team How will internal resources be brought onto the project (e.g. secondment procedures)? Who needs to be consulted? Are there any non-technical criteria for selecting team members? – e.g. clearance. |  |
| Induction process What process will team members go through when joining the team? – e.g. safety briefings, security passes, briefings, email accounts, access to share drives, sign non-disclosure agreement. |  |
| Team building What activities, protocols and processes will be used to build a high performing team culture characterised by a high degree of trust, ‘psychological safety’, sharing of opinions, positive conflict, communication and collaboration? |  |
| Managing the team How will team members be allocated work? How are they to report on progress? How will performance issues be identified and managed? How will line managers be kept informed? |  |
| Disbanding the team What is the process for off-boarding team members? How will people be acknowledged and thanked at the end of the project? How will the team celebrate project completion? |  |
| Sub-plans, tools and templates e.g. OBS, R&R table, RACI, Resource Levelling, Gantt of resources, etc. |  |

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| --- | --- | --- | --- | --- | --- | --- |
| Roles & Responsibilities Table | | | | | | |
| Project role and brief description | Name of person performing role, BAU title/ organisation & phone number | Email | Decision-making authority & financial delegation on this project | Time allocated to work on this project and start/end date | Required experience, qualifications, skills, clearances & checks | Date and person who checked req’s |
|  |  |  |  | Allocated:  Start date:  End date: |  |  |
|  |  |  |  | Allocated:  Start date:  End date: |  |  |
|  |  |  |  | Allocated:  Start date:  End date: |  |  |

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Procurement

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| Procurement Management Plan | | |
| Procurement management concepts, processes, and techniques to be applied e.g. How will the Procurement Plan be developed? What policies, procedures and departments need to be involved in planning and conducting procurement? What incentives will be used (e.g. penalties and/or rewards for time/cost/quality performance)? Who will conduct contract administration? To whom should suppliers send invoices? How will suppliers’ performance be reviewed? How will contracts be closed/discharged? |  |
| Sub-plans, tools and templates e.g. Procurement Plan, Supplier Evaluation Table, Supplier Performance Evaluation, Variation Form, etc. |  |

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| Procurement Plan | | | | | | |
| Procurement Item  *Goods/services/results to be procured from outside the organisation* | Budgeted cost  *Incl GST, AUD* | Special Conditions to be included in contract  *e.g. risks to be transferred, rewards/penalties, intellectual property rights, warranties, etc.* | Method of Procurement  *e.g. RFQ, RFT, panel selection* | Contract type  *e.g. Fixed Price, Cost Plus, Time & Materials* | Supplier Evaluation Criteria  *e.g. price, availability, quality, qualifications, track record, etc – in descending order of priority/importance* | Date complete |
|  |  |  |  |  |  | Click or tap to enter a date. |
|  |  |  |  |  |  | Click or tap to enter a date. |
|  |  |  |  |  |  | Click or tap to enter a date. |

Schedule

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| --- | --- |
| Schedule Management Plan | |
| Time management concepts, processes, and techniques to be applied e.g. How will the schedule be developed and who should be involved? What is the tolerance for being behind schedule? Are there any rewards or penalties for being ahead/behind schedule? What calendar will be used (e.g. 5- or 6-day week)? |  |
| Sub-plans, tools and templates  *e.g. Gantt chart in Microsoft Project, Smartsheet* | * *See Schedule in Dashboard Tab of RADICAL Register* |

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| Milestone Chart |

|  |  |  |  |
| --- | --- | --- | --- |
| Milestone Status | | | |
| # | Milestone Description  *Checkpoints indicating that a certain amount of work has been completed or a significant stage has been reached.* | Status\* | Comments |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |
| 4 |  |  |  |
| 5 |  |  |  |
| 6 |  |  |  |
| \* Status options: 👍 = On track ⌛ = Behind 💣 = Issue ✓ = Complete | | | |

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Cost

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| Cost Management Plan | | |
| Cost management concepts, processes, and techniques to be applied e.g. How will cost plans be developed and who should be involved? Will Earned Value Management be used? What is the tolerance for being over budget? Are there any rewards or penalties for being under/over budget? Are there any funding or cash-flow constraints, such as annual budget cycles? How will human resources be charged to the project (if at all)? How much contingency will be calculated? How will indirect costs be captured? Are profit or amortised costs to be considered? What bank/cost/control accounts will be set up? How and when will committed/receipted costs be captured? |  |
| Sub-plans, tools and templates e.g. Project Cost Estimate, Budget, Cash-Flow, Payback Analysis, EVM tools, etc. | * *See HR Allocations and Project Cost Estimate in Dashboard Tab of RADICAL Register* |

Risk

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| Risk Management Plan | | |
| Risk management concepts, processes, and techniques to be applied e.g. Who needs to be involved in Risk Management? What policies, guidelines and standards are to be complied with? How will risks be identified? What risk categories will be considered (e.g. WHS and Environmental Risk)? What likelihood and impact classifications will be used? How will risk treatment strategies be funded? (e.g. work package contingency?) How will issues be managed/reported? How will open risks be handed over at the end of the project? |  |
| Risk context  *What is relevant about the context of the project and should be taken into consideration when identifying, analysing and managing risk? What existing risk controls are in place?* |  |
| Frequency and format  *How frequently and in what format will you hold risk reviews to maintain currency of risk plans and ensure that treatment strategies have been implemented effectively?* |  |
| Sub-plans, tools and templates What documents, sub-plans, tools and templates will be used to manage this knowledge area? e.g. Risk/Opportunity Register, Issue Log in RADICAL Register. | * *See Risk and Issues Tabs of RADICAL Register* |

Quality

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| --- | --- |
| Quality Management Plan | |
| Quality management concepts, processes, and techniques to be applied e.g. How will quality requirements be identified and who needs to be consulted? Whose definition of quality needs to be considered? Are there any penalties or rewards for under/over-delivering on quality? What needs to be considered – e.g. end user preferences; product lifecycle and through-life/maintenance costs; obsolescence? |  |
| Sub-plans, tools and templates e.g. Quality Plan, Configuration Management, Fishbone Diagram, Process Flowcharts, Checklists, QC charts. |  |

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| Quality Plan | | | | | | | | |
| Item  *A specific product or process, or the whole project* | Quality definition  *What features, functions and attributes will make it ‘fit for purpose’?* | Acceptance criteria *The measure of ‘good enough’ – the minimum acceptable standard* | Applicable standards (if any)  *e.g. Technical/functional standards, Australian/ ISO/ Industry standards or codes, organisational policies.* | Quality Assurance  *What will be done to ensure that products and processes WILL meet the quality definition?* | Date complete | Quality Control  *What will be done to check that completed products and processes HAVE met the quality definition?* | Date complete |
|  |  |  |  |  | Click or tap to enter a date. |  | Click or tap to enter a date. |
|  |  |  |  |  | Click or tap to enter a date. |  | Click or tap to enter a date. |
|  |  |  |  |  | Click or tap to enter a date. |  | Click or tap to enter a date. |

Information & Communication

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| Communication Management Plan | |
| Information & data management protocols (‘rules’) to be applied on this project Where will project information be stored and how will access to it be managed? (e.g. share drive, TRIM, PIMS)? What private, confidential and/or classified information needs to be protected? What file naming and version control protocols will be used? How will obsolete/superseded documents be archived? What information will be handed over at the end of the project, to support the operation and maintenance of the product (e.g. manuals, warranties, maintenance plans)? |  |
| Communication management concepts, processes, and techniques to be applied Who needs to be involved in planning stakeholder engagement planning and implementation? How will conflict and complaints be handled? What Change Management activities will be delivered or supported by the project team (if any)? |  |
| Sub-plans, tools and templates e.g. Status Report templates, TRIM, online share drives, version control software, websites, intranets, social media tools, collaboration tools, etc. | * *Meeting Actions to be recorded in Actions tab of RADICAL Register* |

Stakeholder engagement

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| --- | --- | --- | --- | --- |
| Stakeholder Analysis | | | | |
| Stakeholder  *Name of person or group* | Other relevant information  *e.g. availability, other/previous roles, etc* | Interest  *How does the project impact them? What is their involvement or interest? Is there a real or perceived dis-benefit to them?* | Power & Influence  *How could they impact the project? Who could they influence (positively or negatively) and why would they?* | Level of Engagement  *Inform, Consult, Involve, Collaborate, Empower (see IAP2 Spectrum for definitions)* |
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| --- | --- | --- | --- | --- |
| Communication & Engagement Plan | | | | |
| Stakeholder  *Name of person or group* | Details  *Title, Organisation, Phone, Email* | Key information & messages  *What information do they need? What key messages will they receive from the project team?* | Channel, format and timing  *How will the information be communicated? (e.g. email, meeting, Status Report, website). For each channel, note the relevant template/format of reports and timing (when it should start and frequency of updates)* | Relationship manager  *Who will ensure this stakeholder remains engaged?* |
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Record of Authorisation

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| --- | --- |
| Readiness check | |
| Have relevant stakeholders had input to the plan? Have you consulted with team members to ensure that they understand their role, responsibilities, and accountabilities? Does the team have a common understanding of the project objectives and anticipated future benefits/outcomes – i.e. is there a shared goal? | Choose an item. |
| Has the governance structure and associated policies, procedures and protocols been clearly explained to team members, suppliers and members of the governance structure including delegations of authority, escalation and reporting protocols, financial delegations? | Choose an item. |

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| Additional general comments |
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| --- | --- | --- | --- | --- |
| Endorsement by Steering Committee Members | | | | |
| Name | Title & Organisation | Record of endorsement | Optional comments | Date |
|  |  | Choose an item. |  | Click or tap to enter a date. |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Authorisation by Project Sponsor | | | | |
| Name | Title & Organisation | Record of approval | Optional comments | Date |
|  |  | Choose an item. |  | Click or tap to enter a date. |

|  |  |
| --- | --- |
| *In the interest of supporting ‘good work, done well’, Elemental Projects offers this and other project management templates, free of charge, for people with projects – visit* [*www.elemental-projects.com.au*](http://www.elemental-projects.com.au)*. Users may adapt, use, reproduce, and share our templates on the condition that they are not on sold. Elemental Projects accepts no liability for projects managed using these templates. Copyright © Elemental Projects (Australia) Pty Ltd.* |  |