<Project Name>

<System Name>

<Organizations Name>

<Project Name>

Preliminary Project Plan

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# Introduction

The purpose of this document is to define how the Plan Phase of a project will be executed, monitored and controlled. It details how the Project Management Team intends to satisfy the development of the Project Charter and Project Plan.

# Preliminary Integrated Plan

The purpose of this section is to document the structure, metrics and schedule used to manage Planning Phase of a project.

## Plan Phase Organization

[Purpose of this Section: Provide an organizational chart for the Project Plan Phase that depicts internal Project Teams, vendor organizations, and external governance and oversight groups. This chart should show a clear connection to and participation by the customer. This chart should include all individuals on the project including Resource Managers. The internal Project Teams should include all business and organizational staff assigned to the project. Outside vendors need to be identified by the vendor name and primary point of contact. Refer to Senior Management Review Template for a slide on organization chart.]

**<Project Organizational Chart>**

## Life Cycle and Process Tailoring

[Purpose of this Section: Document the project’s life cycle phases and any process tailoring decisions that have been made. Develop and document an initial Plan & Define Life Cycle approach and document. Update this section during Construct, Test and Deploy Phases when Suppliers have been selected and the Project Development Life Cycle has been determined. Update as needed throughout the project life cycle with changes due to Change Requests or other project influences. Refer to Guidelines for Selection of Project Life Cycle Models.]

**Tailoring Decisions**

| **Tailoring Decision** | **Reasons and Rationale** | **Assumptions and Notes** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

**Tailoring Approval Mails**

[Link any deviation approvals obtained]

## Policies and Standards

[NOTE: This is an optional section, which is to be completed only when it is necessary to identify all organizational and IT Standards pertinent to this project.]

The project will conform to all relevant [Organizations Name] Policies and Standards, including, but not limited to:

* Information Security Policy and Practices
* Corporate Data Standards
* IT Standards Process and Products
* Privacy Principles and Guidelines
* Policies for Project Life Cycle Processes

## Plan Operating Procedures

[NOTE: This is an optional section, which is to be completed only when there is a distinct project specific mode of operation for the team members to work collectively and individually, team to moderate participation and interpersonal interaction, and any other team rules – for example. Definition of Done, Definition of Ready, Working Agreement (example: daily standup, communication working agreement, working environment, core hours, meeting participation rules, flexible timings, inter-group coordination, updating status of action items, etc.]

## Plan Facilities and Support Tools

[NOTE: This is an optional section, which is to be completed only when it is necessary to identify and document facilities and support tools required in order to execute the project tasks and develop its deliverables. Identify the timing of when these facilities and support tools would be required. Include facilities and support tools for disaster recovery.

Identify any critical hardware or software required by the project. Note that this includes hardware or software licenses required for development as well as integration testing. All deployment

**Development Environment Specifications:**

| **Hardware\ Software Required**  | **Qty.** | **Configuration\ Specification** | **Reason or Need** | **Required by Date** | **Plan for Acquisition** | Owner |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

**Testing Environment Specifications:**

| **Hardware\ Software Required**  | **Qty.** | **Configuration\ Specification** | **Reason or Need** | **Required by Date** | **Plan for Acquisition** | Owner |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

indirectly to the Team Lead(s).

# Planning Deliverables

[Purpose of this Section: Identify the product and service deliverables to the Business Group. The project work products are not customer deliverables and shall not be listed as deliverables. For examaple: Project Schedule, Risk Log, etc.]

|  |  |
| --- | --- |
| **Customer Deliverables** | **Delivery Date** |
| Project’s Defined Process |  |
| Approved Project Plan |  |

# Planning Schedule Management

[Purpose of this Section: Identify major milestones and key deliverables for the remainder of the project, including phase completion dates. Estimate work product size, effort, and critical computer resources to develop the deliverables and complete the milestones. Develop and document a proposed schedule for the deliverables and completion of milestones. Project Management Software may be used. Include milestones and deliverables for all project activities, such as: quality assurance, Supplier management, configuration management, communications management, etc.

Using Project Management Software, generate the Gantt chart representing tasks and their relationship to a project timeline. Insert it here or include it as an attachment.]

|  |  |  |
| --- | --- | --- |
| **Activity Name** | **Start Date** | **End Date** |
| Develop Project Charter |  |  |
| Project Charter Peer Review |  |  |
| Review and Approve Project Charter |  |  |
| Estimate Efforts for Define |  |  |
| Review and Approve Define Cost Estimate |  |  |
| Develop Project Plan |  |  |
| Project Plan Peer Review |  |  |
| Review and Approve Project Plan |  |  |
| Procure Resources for Define Phase |  |  |
| Plan Phase Tollgate Review |  |  |

# Planning Cost Management

[Purpose of this Section: Describe the project costs and the expected timing of expenditures for the project. The following elements should be considered: staffing, equipment, resources and materials, travel, administrative, facilities and overhead. Costs for all project phases and activities, including testing and deployment (if part of the project) should be included. Include the Top-Down estimating worksheet that supports the costs and identify assumptions made.]

## Project Shared Vision

[Develop and document here the project’s Shared Vision. The shared vision is built by all Project Team members, including partnering Stakeholders and aligns with IT vision and also with the Project Charter. The shared vision must be shared across all project-integrated teams. When a Supplier team joins the project, this must be shared with that team. The best practice is to brainstorm within the team to get a theme of key drivers of success in the project.]

# Planning Schedule Management

# Planning Cost Management

[NOTE: This is an optional section, which is to be completed only when it is necessary to identify …]

# Planning Quality Management

[NOTE: This is an optional section, which is to be completed only when it is necessary to identify …]

## Reviewer Peer Plan

### Project Charter Peer Review Committee

Identify the reviewers and their focus areas

|  |  |
| --- | --- |
| Reviewers | Focus Area |
|  |  |
|  |  |
|  |  |

### Project Plan Peer Review Committee

Identify the reviewers and their focus areas

|  |  |
| --- | --- |
| Reviewers | Focus Area |
|  |  |
|  |  |
|  |  |

## Review and Approvals

### Review and Approve Project Charter

Reviewers

### Review and Approve Define Phase Cost Estimate

Reviewers

### Review and Approve Project Plan

Reviewers

# Planning Human Resource Management

[NOTE: This is an optional section, which is to be completed only when it is necessary to identify …]

## Team Involvement Plan

[Identify the Project Team Members who are assigned to the project, their roles, responsibilities, contact details and project allocation percentage. Complete the list of Project Roles and Responsibilities. Use the Project Roles Skills Training Plan Template to identify Project Team Members, their role, skills and required training. Also add the SAM Team‘s composition, if applicable, based on the Supplier Sourcing Plan.]

# Planning Communications Management

[NOTE: This is an optional section, which is to be completed only when it is necessary to identify …]

# Planning Risk Management

## Plan Dependencies, Constraints, Assumptions, Exclusions

[NOTE: This is an optional section, which is to be completed only when it is necessary to identify any existing systems or planned/in-process developments, which may affect or may be affected the plan execution. Add dependencies as they are identified during planning. In addition, identify any anticipated reuse components. Identify the constraints, assumptions and exclusions that exist for planning.]

### Dependency Management Plan

| Deliverable Required | Required From | Required By Date | Escalation Path | Communication or Tracking Mechanism |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |

[Also capture any dependencies that the Supplier may have on the organization or another Supplier]

Identify existing projects/initiatives that are planned/in process, which will affect or be affected by this project. Consider the following:

* Conflicts in schedules
* Overlap in objectives
* Overlap in priorities

### Constraints

[Purpose of this Section: Identify factors that will limit the Project Team’s options along with factors that they must account for as they develop their solution. For example, a predefined budget is a constraint that is likely to limit the team’s options regarding scope, staffing and schedule. Also capture constraints related to Supplier activities here as well.]

### Assumptions

[Purpose of this Section: Identify factors that, for planning purposes, will be considered to be true, real, or certain. For example, any resources assigned to the project will be assumed to remain with the project for the duration. Also capture any assumptions related to Supplier activities here as well.]

### Exclusions

[Purpose of this Section: Identify products, services or processes that are not specifically a part of the project. An example statement might be, “anything not explicitly included in the project deliverables is implicitly excluded from this project.”]

# Planning Procurement Management

[NOTE: This is an optional section, which is to be completed only when it is necessary to identify …]