



Project Plan Preparation Guidelines

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1. PURPOSE

Instruction:

This section provides the purpose of the document.

Recommended text:

This Project Plan describes what work the **<insert project name>** will do, what results will be achieved, and how project work will be executed and managed. It describes team roles and responsibilities and deliverables. It identifies assumptions, constraints, dependencies, risks, and issues, and it provides high level schedule and budget information.

2. BACKGROUND

Instruction:

This section describes the problem or opportunity the project seeks to address and provides other relevant background information:

- Change in legislation requires action.
- Current technology is outdated and not meeting needs.
- Service levels are low, resulting in frequent customer complaints.
- Demand for products or services is changing.

Tips

- Be consistent with the “Problem / Opportunity” section of the Project Definition Document and Business Case if one or both of these was written. Update the problem / opportunity and provide more detail as required.
- Be concise. Try to keep this section to half a page or less.
- Focus on information relevant to the project rather than providing a lot of background information on the organization undertaking the project.

3. GOAL AND OBJECTIVE

Instruction:

This section lists one project goal and the project objectives. The project goal is a clear, concise statement of the project’s purpose and desired results. Project objectives are concise statements of what the project must achieve to realize the project goal. Objectives can be thought of as “sub-goals”.

Example:

The goal of this project is to reduce traffic accidents. This goal will be achieved if the following three objectives are achieved:

1. Increase public awareness and knowledge of how to drive safely.
2. Pass new, stricter laws for speeding and seatbelt violations.
3. Assign more police to enforce new, stricter laws.

Tips:

- Be consistent with the “Project Goal” and “Project Objectives” sections of the Project Definition Document and Business Case if one or both of these was written. The project goal and objectives should not change if they have already been approved.
- Be concise. Goal statements and objectives are typically each one sentence long.

4. SCOPE

Instruction:

This section summarizes the scope of the proposed project by providing a list of key activities and deliverables. In the table provided in this section of the template, list (i) the activities the team will do and (ii) the activities the team will not do but that a reader might mistakenly believe the team is doing.

For example, configuring new software may be in scope for the project team, but training staff on new software may be out of scope because the vendor is providing this service.

Tips:

- Be consistent with the “Scope” section of the Project Definition Document if one was written, but update the scope and provide more detail as required.
- Check that all work in scope supports the project goal, objectives, and outcomes.
- Begin each entry in the table provided in the template with a verb or “action word.”

5. ASSUMPTIONS AND CONSTRAINTS

Instruction:

List the project assumptions and constraints in the table provided in the template.

Tips:

Be consistent with the “Assumptions and Constraints” section of the Project Definition Document and Business Case if one or both of these was written, but update the assumptions and constraints and provide more information as required.

Recommended text:

An assumption is a circumstance or event outside the project that can affect its success and that the authors of this plan believe will happen. Constraints are restrictions or boundaries placed upon the project that limit the choices of the project team. The assumptions and constraints for this project are listed in the table below.

Example assumptions:

- The Sponsor will be available for weekly status meetings and approvals.
- Contractors with the appropriate levels of skill and experience will be available to support delivery.

Example constraints:

- The project must be completed in four months.
- The final deliverables must adhere to international standards of performance and safety.
- The Project Manager will use the Qatar National Project Management (QNPM) Framework.

6. DELIVERABLES

Instruction:

In the table provided in the template, list each deliverable name with a brief description. This will provide a shared understanding of what is being produced by the team. Deliverables are tangible items that must be produced to complete the project. These can include generic project management deliverables – such as weekly status reports – as well as items specific to the project.

Example section:

The project is completed when the deliverables listed in the following table are completed.

Deliverable Name	Description	Format
Examples of Project Management Deliverables:		
Status Reports	Weekly status reports on project progress, issues, risks, and changes. Status reports will be provided in the QNPM template.	MS Word
Lessons Learned Document	Final Lessons Learned document summarizing key project information to assist with future projects. The Lessons Learned Document will be consistent with the QNPM template and be provided at the close of the project.	MS Word
Project Acceptance Document	A document summarizing deliverables and their acceptance date as well as the conclusions of any project evaluation. The Project Acceptance document will be consistent with the QNPM template and be provided at the close of the Project.	MS Word
Project Archives	At the close of the project, the team will provide an electronic record of all final deliverables and project management records (schedule, budget, status reports, logs etc).	CDROM/DVD
Examples of other Deliverables:		

Deliverable Name	Description	Format
Technical requirements specification	A document detailing all of the technical requirements of the final software deliverable	MS Word
International Symposium of Planning Managers	A 3-day conference that will include experts from at least 5 different jurisdictions	3-day conference

7. STAKEHOLDERS

Instruction:

This section lists project stakeholders, or people with an interest in or influence over project work and results. This section also indicates how stakeholders will be impacted on and engaged by the project.

Examples of key stakeholders are as follows:

- Decision-makers: People with authority and decision-making power over the project.
- Influencers: People who influence and advise decision-makers.
- End users: People who will use the end product of the project.

Tips:

- A checklist to help identify stakeholders is available at www.qnpm.gov.qa.
- Collaborative roles with stakeholders include stakeholders being members on a Steering Committee, participating on the project team, or approving one or more deliverables.
- Consultative roles for stakeholders include membership on an Advisory Committee or participation in focus groups or working groups.
- In the left-hand column of the table below, it is typical to provide the individual title for senior executives and the name of a group of staff or unit for employees.

Example section:

This section lists project stakeholders, or people with an interest in or influence over project work and results. This section also indicates how stakeholders will be impacted by the project and how they will be engaged.

Stakeholder	Impact	Engagement
Director, Finance	Will receive new financial reports; will attend 1 day of training	Sponsor
Manager, Finance	Will use new processes and technology to create new reports; will supervise implementation of new processes with department staff	Steering Committee member
Accounting Staff	Will use new processes and technology; will attend 3 days of training; will experience some facilities changes	Two staff to join project team; rest to participate in joint design sessions

8. OUTCOMES/SUCCESS MEASURES

Instruction:

Provide a list of statements about the impact the project must have on those outside the project to be considered successful and how those impacts will be measured.

Example:

The project will be considered successful if the following statements are true:

- The number of traffic accidents is reduced--as indicated by statistics from MOI.
- Program costs are reduced -- as indicated by actual costs accrued at the end of this fiscal year compared to actual costs accrued over the past five fiscal years.
- There are higher levels of customer satisfaction -- as indicated in a customer satisfaction survey.

Tips:

- Be consistent with the “Outcomes / Success Measures” section of the Project Definition Document and Business Case if one or both of these was written. Update outcomes and success measures and provide more detail as required.
- Outcome statements must be consistent with the project goal.
- Be sure that data can be gathered relatively easily to demonstrate the achievement of an outcome.
- Be sure to clarify in the Scope section of this document if an evaluation of the project is to be carried out – either as part of the project’s scope or by another team at a later date.

9. BUDGET SUMMARY

Instruction:

Use the table in the template to provide a summary of the project costs detailed in your Project Budget. Note the budget should be included as an Appendix to the Project Plan. Below the table, list the financial assumptions made during the development of the budget and sources of financial information.

Example assumptions:

- Cost of materials will not increase during this project.
- Salary costs based on 2005 salary levels.
- Consultant costs based on current signed contract.

10. HUMAN RESOURCES PLAN

Instruction:

This section contains the results of human resource planning activities completed to support this project.

This section describes the roles and responsibilities of the project team, provides their start and finish dates, and provides an organizational chart for the project.

Tips:

- Note that standard role descriptions and a standard organization chart are provided in the job aids section of www.qnpm.gov.qa.
- Start and finish dates for resources must be consistent with the project schedule.
- “Days effort” in the Resource Schedule does not refer to the duration a team member is working on a project. It refers to the number of business days they will be required to complete their work. For example, someone working a two-day per week on a project for 20 weeks has 40 days effort.
- If some resources are still being recruited at the time of writing this Plan, put “to be determined” or “tbd” in the place of the resource name, but provide a title, role, and start and finish dates, and include that role in your organization chart.
- The names and titles in the roles and responsibilities table, resource schedule, and organization chart should be consistent with each other.
- Remember to include Steering Committee and Advisory Committee members.
- Note that the project organization chart will change over time as different work may call for different resources. For example, you may have a different team for design than for building or implementing a deliverable. Try to reflect the overall composition of the team over the life of the project in the Project Plan – not just the team composition for the first stage of work.

10.1 Roles and Responsibilities

Example section:

The following resources are required for the project.

Name	Title and Role
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Name	Title and Role
Example:	
Jason Doe	Project Sponsor Oversees a project and reviews progress at milestones Clears project road blocks such as negotiating with other organizations, securing resources, and assisting with strategic issues and risks Chairs the Steering Committee
John Doe	Project Manager Oversees day-to-day execution of project Maintains Project Plan, Schedule, and Budget Reports status Executes PM processes for risks, issues, change control, and document management Maintains project records and deliverable archives Recruits team members and manages performance Chairs weekly team status meeting and Advisory Committee meeting
BD	PMO Lead Provides project management and admin support to Project Manager Maintains risk, Issue, and change logs Tracks deliverables and maintain project archives Updates Project Plan, Schedule, and Budget Processes expenses Manages purchasing and contracts

10.2 Resource Schedule

Example section:

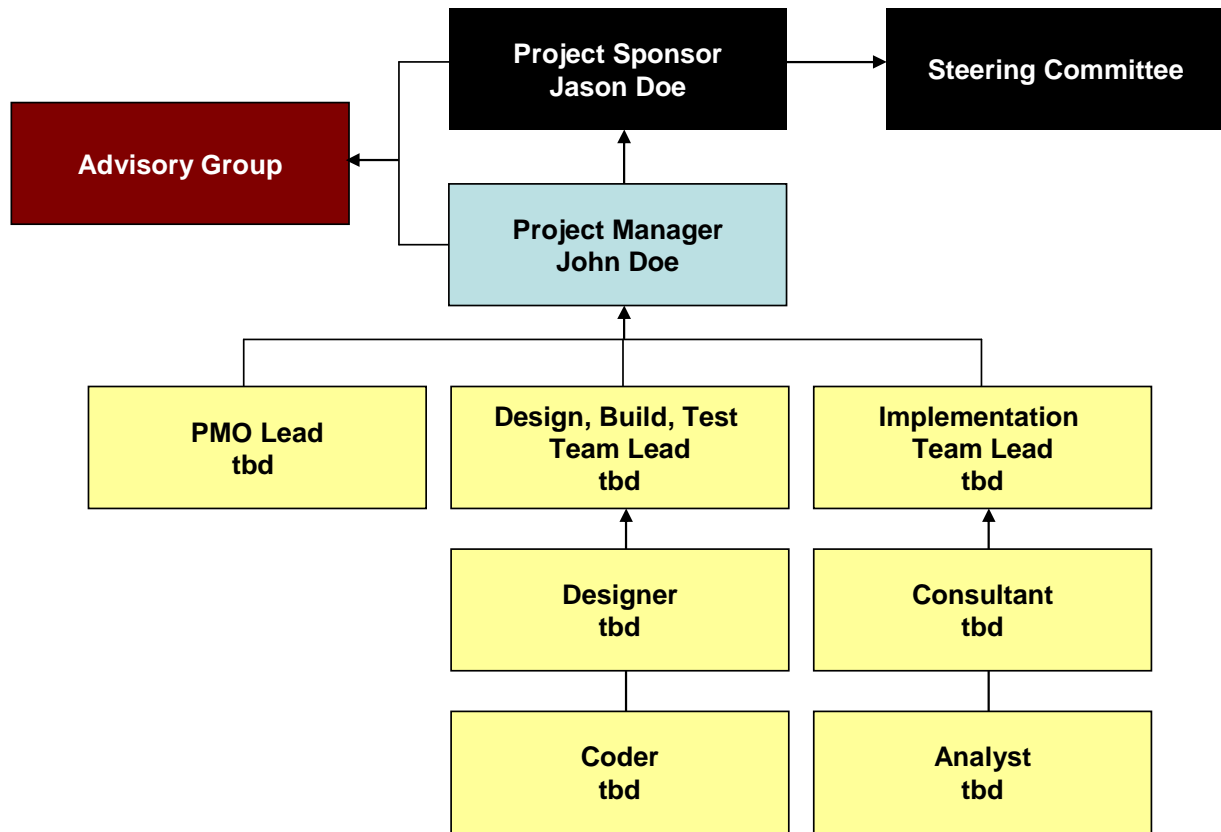
The following table is a listing of the start and end dates for all resources.

Name	Title and Role	Start Date	Finish Date	Total Days Effort
Insert the name of the resource	Insert the title of the resource	Insert the start date based on the schedule	Insert the finish date based on the schedule	Insert the total number of days effort for the resource from the schedule
Example:				
Jason Doe	Project Sponsor	02.06.06	02.06.07	24 days
John Doe	Project Manager	02.06.06	02.06.07	150 days
TBD	PMO Lead	02.06.06	02.06.07	150 days

10.3 Organizational Chart

Example section:

The team will be structured as follows:



11. SCHEDULE SUMMARY

Instruction:

This section lists project milestones and their dates. Milestones are significant dates in a project that typically mark the end of a phase, the completion of a major deliverable, or a major project decision. Milestones are generally used as checkpoints during the project to gauge status and are often used to get approval to continue to the next stage of work.

Example:

This project has six milestones. The Project Manager will meet with the Sponsor at each milestone to review progress and obtain approvals and decisions as required.

1. Design complete: October 30, 2006
2. Vendor selected: November 30, 2006
3. Build complete: January 30, 2007
4. Testing complete: February 30, 2007
5. Implementation Plan complete: February 30, 2007
6. Implementation complete: June 30, 2007

12. EXTERNAL DEPENDENCIES

Instruction:

This section lists the inbound and outbound external dependencies for the project. "Inbound dependencies" are items the project team requires to continue its work but that are being completed by resources outside of the project team. "Outbound dependencies" are items the project team is producing that others need outside the project.

Example Inbound Dependencies

- Data from Ministry X

- An interface agreement from Ministry Y
- Logo, tagline, and poster from Marketing Firm

Example Outbound bound Dependencies

- Project Z requires project design documents
- Project Y requires logo, tagline, and poster

13. RISKS

Instruction:

In this section, the project risks identified to date, along with their estimated probability and impact and recommended response are listed.

A risk is something that may or may not occur in the future and that can have an impact on the success of the project. “Probability” means the likelihood that a risk will occur and is expressed as High, Medium, or Low. “Impact” describes how seriously the risk could affect the project and is also expressed as High, Medium, or Low.

Tips:

- Include the risks listed in the Project Definition Document and Business Case if one or both of these was written.
- Checklists for identifying risks can be found on www.qnpm.gov.qa.
- Use concrete definitions of terms like “High,” “Medium,” and “Low.” These definitions are called “risk tolerances,”. Advice on setting risk tolerances can be found in the Risk Management Plan at www.qnpm.gov.qa. For example, probability definitions could be as follows:
 - Low equals <25%
 - Medium equals 26%-74%
 - High equals 75%- 99%
- Do not include things that have a 100% chance of happening or that have already happened: these are issues, not risks.
- A good risk event statement includes what might happen and its effect on a project. For example, “weather” is not a risk event statement. “Bad weather may delay project completion” is a risk event statement.

14. ISSUES

Instruction:

This section lists project issues identified to date and provides a recommended response to the issues.

Issues are things that are currently happening and have a negative impact on the project. In the table provided in the template, list any issues that may have been identified while writing the Project Plan along, and include recommended actions to resolve issues.

Tips:

Only include things that are currently happening or have a 100% chance of occurring in the future.