**Project Planning Templates**

**John Readings Pty Ltd**

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# 1.1 Initiation and Scope

### Project brief

**Project purpose and rationale***The justification and validity of the project needs to be confirmed before the project proceeds. This document is used to clarify the project purpose and justification and to gain approval to proceed to the next phase.*

**Project title***Working title.*

**Project purpose***Describe the purpose/need/rationale/feasibility for the project.*

**Background and strategic context***Explain the background to the project and how it relates to the key strategic plans.*

**Priority***Note the importance and/or urgency of the project to the organisation.*

**Related projects***Any other projects that have been undertaken in the past, are currently underway, or planned for the future that will or may be affected by, or simply connected to, this project.*

**Project client/owner***The person who requires the project to be undertaken.*

**Project sponsor***The person who is providing the funds and has the ultimate authority over the project.*

**Project manager***The person who has the responsibility to manage the project on a day-to-day basis.*

**Project status***What has already been decided about the project? What decisions have already been made? What work has already been done in relation to the project? Any assumptions or constraints?*

**Special provisions***Special regulations, ethical or legal considerations, etc.*

**Project approvals***Add any signatures that are required for approval to proceed to the next phase.*

Click or tap here to enter text. Click or tap here to enter text.

Project Manager Project Sponsor

Click or tap here to enter text. Click or tap here to enter text.

Project Client/Owner Other

|  |  |  |
| --- | --- | --- |
| **Project Title:**  | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

Project Scope Document
*This template is a tool that can be used with key stakeholders to clearly define the logical boundaries of the project. Ensure that you note any requirements that are* ***out*** *of scope to achieve absolute clarity about what is and is not covered by this project, and to avoid the potential for problems later on.*

|  |  |  |  |
| --- | --- | --- | --- |
| In Scope | Out of scope (exclusions) | Assumptions | Constraints |
| *These are items that you are definitely going to deliver/manage.* | *These are items that you are not responsible for – the assumption is that someone else will do them.* *Exclusions are things that don’t form part of your project but could influence whether or not you can successfully achieve your objective.* | *Knowledge about the project that is taken as being true or correct for the purposes of project planning.* *Assumptions are circumstances and events that need to occur for the project to be successful but are outside the total control of the project team.* | *These could include any restrictions to the start/finish date, time, deliverable or milestone dates, budget limitations, resourcing limits, vendor restraints, legal constraints, etc.* |
| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

Stakeholder Analysis *Use this template to identify areas, groups or individuals who may participate in, or are affected by, the project. Include everyone who has a vested interest. A useful question to ask is: ‘What will make this project a success for you?’*

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Work area | Stakeholder type (client, end-user) | Impact on/by project, requirements, success criteria |
|  |  |  |  |
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| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

### Communication Plan (example)

| What | Who | Purpose | When/frequency | Type/methods |
| --- | --- | --- | --- | --- |
| **Initiation meeting** | All stakeholders. | Gather information for initiation plan. | FIRSTBefore project start date. | Meeting. |
| **Distribute project initiation plan** | All stakeholders. | Distribute plan to alert stakeholders of project scope and to gain buy in. | Before kick-off meeting.Before project start date. | Project snapshot distributed via hard copy or electronically. May be posted on project website. |
| **Project kick-off** | All stakeholders. | Communicate plans and stakeholder roles/ responsibilities.Encourage communication among stakeholders.  | At or near project start date. | Meeting. |
| **Status reports** | All stakeholders and project office. | Update stakeholders on progress of the project. | Regularly scheduled. Weekly is recommended for small-medium projects. | Distribute status report electronically and post via website. |
| **Team meetings** | Entire project team.Individual meetings for sub-teams as appropriate. | To review detailed plans (tasks, assignments, and action items). | Regularly scheduled. Weekly is recommended for entire team. Weekly or bi-weekly for sub‑teams as needed. | Meeting: detailed plan. |
| **Sponsor meetings** | Sponsor/s and Project Manager. | Update sponsor/s on status and discuss critical issues. Seek approval for changes to project plan. | Regularly scheduled.Recommended bi‑weekly or monthly and also as needed when issues cannot be resolved, or changes need to be made to project plan. | Meeting. |
| **Project Title:**  | **Project Client:** | **Date: Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:**  | **Page x of y** |

Roles and Responsibilities *It is important to identify who the major players are on the project. List the major project roles, responsibilities and the actual people involved. Add in any additional roles as required.*

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Name/s | Responsibilities | Signature/s(if required) |
| **Project client/owner***The person who requires the project to be undertaken.* |  |  |  |
| **Project sponsor/project director/project board***Senior management of the project. Accountable for the success of the project. Has the authority to commit resources.* |  |  |  |
| **Project manager** *Person responsible for running the project on a day-to-day basis within defined authorities for cost and schedule as agreed with the project sponsor/board.* |  |  |  |
| **Manager of the project manager***The operational/line manager who the project manager reports to on a day-to-day basis.* |  |  |  |
| **Project team members***Staff who will be working on the project.* |  |  |  |
| **Steering committee/working party***To provide advice and recommendations.* |  |  |  |
| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

Project Snapshot *The project snapshot summarises the purpose, deliverables, stakeholders, resources, risks, interdependencies and success criteria of the project.*

|  |
| --- |
| Project snapshot |
| **Name of project:** |
| **Project purpose:** *What are the goals/objectives of this project? Why are we undertaking it? What is the problem/opportunity?* |
| **Deliverables with timeframes** *What, when, etc.* | **Stakeholders** *Who is the sponsor, project manager, customers, and other key groups who can impact, or be impacted by, this project.* |
| **Resources** *Cash flow, people, equipment, facilities, software, etc.* | **Risks** *Resource limitations, deadlines, budget, technology, legal and other constraints, etc.* |
| **Interdependencies** *With other projects, groups, system interfaces, etc.* | **Success criteria** *How we know we are successful.* |
| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

# 1.2 Planning

Work Breakdown Structure
*A work breakdown structure (WBS) in* [*project management*](http://en.wikipedia.org/wiki/Project_management) *is a tool used to define and group the project’s discrete work elements (or tasks) in a way that helps organise and define the total work scope of the project. The WBS is a dynamic tool and can be revised and updated as needed by the project manager.*

|  |  |  |
| --- | --- | --- |
| Level 1 | Level 2 | Level 3 |
| Task 1 |  |  |
|  | Sub-task 1.1 |  |
|  |  | Work item 1.1.1 |
|  |  | Work item 1.1.2 |
|  |  | Work item 1.1.3 |
|  | Sub-task 1.2 |  |
|  |  | Work item 1.2.1 |
|  |  | Work item 1.2.2 |
|  |  | Work item 1.2.3 |
| Task 2 |  |  |
|  | Sub-task 2.1 |  |
|  |  | Work item 2.1.1 |
|  |  | Work item 2.1.2 |
|  |  | Work item 2.1.3 |
|  | Sub-task 2.2 |  |
|  |  | Work item 2.2.1 |
|  |  | Work item 2.2.2 |
| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

### Project Plan*The project plan is the basis for monitoring and controlling the project. All project information is consolidated to date, forming the basis for monitoring and controlling once implementation of the project commences.*

#### Project title:

#### Project purpose

*From project proposal – update if required.*

#### Background and strategic context

*From project proposal – update if required.*

#### Other related projects

*From project proposal – update if required.*

#### Project objective

*From project proposal – update if required.*

#### Scope including key deliverables

*From project proposal – update if required.*

*In scope.*

*Out of scope.*

#### Assumptions

#### Constraints

#### Deliverables

#### Governance

*From project proposal – update if required. Attach a project organisation chart and additional information on responsibilities if required.*

#### Project client/owner

*From project proposal.*

#### Project sponsor

#### Project Manager

#### Manager of the project manager

#### Project team members

#### Key stakeholders

*From project proposal – update if required. Include a more detailed stakeholder analysis in the Appendices, if required.*

#### Schedule

*Using the information you generated in the work breakdown structure, update the schedule. Include a Gantt chart or additional planning information in the Appendices.*

|  |  |  |
| --- | --- | --- |
| Item | Milestone date | Responsibility |
|  |  |  |
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#### Resource and Cost Plan

*Resource planning is where you determine what resources (people, equipment and materials) and what quantities of each should be used to perform activities. Once the resources have been determined, estimate the project costs. Include a more detailed resource and cost plan in the appendices if required.*

|  |  |  |
| --- | --- | --- |
| Deliverable/milestone/phase | Resource | Cost |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

#### Project Risk Assessment

*From project proposal – update if required. Include a more detailed risk management plan in the appendices.*

|  |  |  |
| --- | --- | --- |
| Risk | Level (high/medium/low) | Management strategy |
|  |  |  |
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#### Quality Management Plan

*Include a high level quality management plan here. Include a more detailed quality management plan in the appendices if required.*

|  |  |  |
| --- | --- | --- |
| Item from WBS | Agreed quality standard | Recovery procedure |
|  |  |  |
|  |  |  |
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#### Communications and reporting

*Include a high level communications plan here. Include a more detailed communications management plan in the appendices if required.*

|  |  |  |  |
| --- | --- | --- | --- |
| Stakeholder | Information required | When required | Format |
|  |  |  |  |
|  |  |  |  |
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#### Controls

*Outline how you are going to track, monitor and report on the project. For example:*

* *Status reports,*
* *Exception reports,*
* *Issues/risk log,*
* *Variance requests.*

#### Appendices

*List the appendices that are attached to your project plan, for example:*

* *Stakeholder needs analysis,*
* *Work breakdown structure,*
* *Gantt chart,*
* *Activities schedule,*
* *Budget/cash flow,*
* *Human resource planning schedule,*
* *Roles and responsibilities,*
* *Procurement schedule,*
* *Combined resources and cost schedule,*
* *Risk management plan,*
* *Quality management plan,*
* *Communications management plan.*

#### Future related projects

#### Project approvals

*Add any signatures that are required for approval to proceed to the next phase.*

Click or tap here to enter text. Click or tap here to enter text.

Project Manager Project Sponsor

Click or tap here to enter text. Click or tap here to enter text.

Project Client/Owner Other

|  |  |  |
| --- | --- | --- |
| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

Gantt Chart*To use a Gantt chart, list the activities and tasks in column A, select an appropriate time interval (days, weeks or months), allocate the dates to columns B onwards and plot the expected time duration (total time from start to completion) under the appropriate column by selecting shading from the cells. When you wish to provide a status report, simply colour or shade in black those items that are completed or estimate the percentage complete. This will give you an immediate visual representation as to whether or not you are on schedule. You can add extra columns for assignment of responsibilities, etc.*

*For small projects, a Gantt chart can be created as a spreadsheet.*

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Activity/task | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 |
|  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |
|  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |
|  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |
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|  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |
|  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |
|  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |
| **Legend***If there are many tasks or stages in your project, you can identify them with a key or legend.*

|  |  |  |  |
| --- | --- | --- | --- |
|  | *Task 1* |  | *Task 5* |
|  | *Task 2* |  | *Task 6* |
|  | *Task 3* |  | *Task 7* |
|  | *Task 4* |  | *Task 8* |

 |
| **Project Title:**  | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

Activities Schedule
*The activities schedule is a tool used to monitor individual activities against the project plan. Information recorded on the schedule can be used when providing project status updates to stakeholders.*

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Phases & activities** | **Responsibility** | **Resources** | **Effort (hrs)** | **Started** | **Deadline** | **Actually completed** | **Comment/status** |
|  |  |  |  |  |  |  |  |
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| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

Budget
*The project budget is a prediction of the costs associated with a particular project. These costs include labour, materials, and other resources required to complete the project.*

|  |
| --- |
| **Project Name:** |
| **Income** | **Inc. GST** | **Ex. GST** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| **Total income** |  |  |
| **Expense** | **Inc. GST** | **Ex. GST** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| **Subtotal** |  |  |
| **Contingency (+10%)** |  |  |
| **TOTAL** |  |  |
| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

Risk Register *This template is used to record identified risks associated with your project, analyse the impact and determine resultant action to be taken.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Risk | Likelihood(H/M/L) | Impact(H/M/L) | Risk response (contingency strategies) | Responsible |
|       |       |       |       |       |
|       |       |       |       |       |
|       |       |       |       |       |
|       |       |       |       |       |
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|       |       |       |       |       |
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| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

Risk Assessment Form
*Identified risks are logged on a risk form and a copy is forwarded to the project manager.*

|  |
| --- |
| Project details |
| Project Name: **Project Name** *Project name to which the risk relates.***Project Manager**: *Name of the project manager responsible for mitigating the risk.* |
| Risk details |
| **Risk ID:** *Number allocated to this risk.***Raised by:** *Name of person who has raised the risk.***Date raised:** *Date of completion of this form.*  |
| **Description of risk**: *Briefly describe the identified risk and its possible impact on the project (e.g. scope, resources, deliverables, timelines and/or budgets).* |
| **Likelihood of risk:** *Describe and rank the likelihood of the risk occurring (i.e. low, medium or high).* | **Impact of risk:** *Describe and rank the impact on the project if the risk occurs (i.e. low, medium or high).* |
| **Risk mitigation** |
| **Preventative actions recommended:** *Briefly describe any action that should be taken to prevent the risk from occurring.***Contingency actions recommended:** *Briefly describe any action that should be taken, should the risk occur, to minimise its impact on the project.* |
| **Approval details** |
| **Supporting documentation:** *Details of any supporting documentation used to substantiate this risk.* |
| **Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** **Date: \_\_\_ /\_\_\_ /\_\_\_\_**PLEASE FORWARD THIS FORM TO THE PROJECT MANAGER |
| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

# 1.3 – Implementation

Change Requests
*This form is used to assist with recording and management of changes in scope, time, quality or budget. The change management procedure must be negotiated with the key stakeholders prior to the sign-off of the project plan.*

|  |
| --- |
| Change request – Project |
| **Issued by** |  |
| **Item affected** |  |
| **Nature of change requested** |  |
| **Reason for change** |  |
| **Impact on scope** |  |
| **Impact on budget** |  |
| **Impact on schedule** |  |
| **Changeauthorised:** | **Yes/No** | **Adj. completion date:** | **Adj. final budget: $** |
| Signed: **Project Manager** | Signed **Sponsor**  | Signed**Client** | Signed  |
| Date  | Date  | Date  | Date  |
| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

Issues Log
*In this template all issues are treated as risks. They should be recorded when they arise, assigned a number and responsibility, a recovery strategy or alternate path agreed, acted upon and recorded when closed.*

|  |  |  |  |
| --- | --- | --- | --- |
| Item | Strategy | Date logged | Date resolved |
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|  |  |  |  |
|  |  |  |  |
| Signed: **Project Manager** | Signed: **Sponsor** | Signed: **Client** | Signed:  |
| Date:  | Date:  | Date:  | Date:  |
| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

# 1.4 Monitoring

Status Update Report *This is one example of a status report. The preferred format should be negotiated with the project sponsor. Attach minutes of project meetings.*

|  |
| --- |
| Status report – Project |
| Item | Work completed to‑date | Milestone date | Revised/ actual date | Budgeted cost | Revised/ actual cost | Responsible |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

# 1.5 Finalising and Review

### Budget Variation Report *The project budget is a prediction of the costs associated with a particular project. These costs include labour, materials, and other resources required to complete the project.*

|  |
| --- |
| Project name: |
| Income | Budget | Actual | % Variation |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| Total income |
| Expense | Budget | Actual | % Variation |
|  |  |  |  |
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|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| Subtotal |       |       |       |
|  |
| TOTAL |       |       |       |
| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

Post-Project Review Meeting
*This template provides a proposed post-project review meeting agenda, detailing items to be discussed when reviewing the overall project.*

|  |
| --- |
| Post-Project Review Meeting – Agenda |
| Topic | Speaker | Time |
| **Brief overview of project:***Purpose of project, major accomplishments, comments.* | Project Manage | 5 mins |
| **Review by team:***Goals, objectives, deliverables, schedule, budget, and success criteria (Were they met, partially met, or missed?).* | All | 10 mins |
| **What worked/what could have gone better?***Some areas to consider:** *Project planning,*
* *Project management,*
* *Project scheduling and tracking,*
* *Project estimating,*
* *Communication (with team, other groups/stakeholders, sponsor),*
* *Risk management,*
* *Vendor management,*
* *Issues management,*
* *Stakeholder management,*
* *Resourcing,*
* *Users,*
* *Development approach:*
	+ *Methodology,*
	+ *Analysis and design,*
	+ *Development,*
	+ *Testing,*
	+ *Implementation,*
* *Training, documentation,*
* *Technology,*
* *Overall approach to project (i.e. Vendor package, staged implementation, etc.),*
* *Production and operation support.*
 | All | 20 mins |
| **Lessons learned** | All | 10 mins |
| **Next steps** | All | 5 mins |
| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

Handover Report
*This template summarises the project as delivered and any agreed changes to baseline scope, quality, costs and schedule.*

|  |
| --- |
| Handover report |
| Initial overall objectives |  |
| Agreed changes to objectives |  |
| Final agreed deliverables |
| Item | Budgeted cost | Final cost | Schedule date | Final date |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| Total |  |  |  |  |
| Issues summary |
| Item | Strategy | Date logged | Date resolved |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| Documents attached |
| No. | Title |
|  |  |
|  |  |
| Click or tap here to enter text.Project Manager | Click or tap here to enter text.Project Sponsor | Click or tap here to enter text.Project Client |
| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |

Post-Project Review Report *This template can be used to guide you through the process of conducting a post-project review. This template can be used to document the key learning in terms of what worked well and what could have been improved.*

|  |
| --- |
| Post-Project Review Report |
| **Name of project:****Date and location of meeting:****Names of attendees:** |
| 1. **Overview by Project Manager:** *Brief summary of highlights and achievements, etc.*
 |
| 1. **Review by team of goals, objectives/deliverables and schedule as outlined in project plan** *Cut and paste from project plan.*
 |
|  | Met | Missed | Partially met | Comments |
| Project goal/s |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| Objectives/deliverables  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| Success criteria |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| Schedule |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| Budget |  |  |  |  |
| 3. What worked well; what could have gone better? |
| Worked well | Could have gone better |
|  |  |
|  |  |
|  |  |
| 4. Lessons learned |
|  |
|  |
| 5. Next steps / improvement plans |
|  |
|  |
| **Project Title:** | **Project Client:** | **Date:      Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | **Page x of y** |