Generic Project Plan Template

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# Context

*Please remember this document template is just a suggestion; every business and organisation will have different documentation standards and expectations of their business analysts, so only use the templates that will help you drive value in your role. There are no formal “standards” across the Business Analyst profession, and this is merely a starting point to help you get started. We recommend, suggest and implore you to edit, modify, delete, add, substitute and otherwise re-work this to provide value. The commentary/advice highlighted in italic blue like so is designed to help you fill out the documentation, and SHOULD BE DELETED BEFORE DISTRIBUTION INTERNALLY!*

This document is used to assist your project manager/product owner/team lead with documenting a project.

It requires input from the project manager/product owner/team lead and potentially other SMEs.

*We create and share this content to help give back to the community, and give aspiring Business Analysts the guidance we wish we had when we started out.*

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# Document Control

## Summary of Document Changes

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| --- | --- | --- | --- |
| **Version** | **Date** | **Author** | **Reason** |
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## Quality Assurance

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| **Version** | **Date** | **Reviewer** |
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## Document Approver

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| **Name** | **Date** | **Signature** |
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# Introduction

## Purpose

<Document the purpose of this document

Example: The purpose of this document is to detail the business requirements>

## Background

<Brief description on the initial stimuli of the project and how the organization intends to achieve its goals and make the desired transition and by what means>

## Definitions

<List any terms the audience may not understand, including specific terms, abbreviations and acronyms>

|  |  |
| --- | --- |
| **Terms, abbreviations and acronyms** | **Meaning** |
|  |  |
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## Referenced Documents

|  |  |
| --- | --- |
| **Document Number / Location / Links** | **Reference Description/Name** |
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# Objectives and Benefits

## Objectives

<Identify the overall projects objectives. This will help in providing the context in which the project is being undertaken>

## Benefits

<Summarise the high level benefits that the project is expecting to achieve. Refer to the Benefits Management Plan in the Appendix>

# Scope

## In Scope

<Include the scope of the project>

## Out of Scope

<List what is excluded from the project scope>

# Planning considerations

## Constraints

<Describe the major constraints that have been identified>

## Assumptions

< Describe the assumptions that have been considered for its successful delivery>

## Dependencies

<Describe the dependencies of the project>

## Lessons incorporated

<Document any relevant recommendations from earlier projects that are relevant in planning this current project>

# Relevant Policy and Legislation

< Identify any policies or legislation that the project has initiated from and document their impact on the project>

# Governance and organisation

<Outline the governance and decision-making structure for the project.

The project’s organisation chart can also be included here even if just the roles have been defined at this stage. The roles and responsibilities of the project management team members should be document here.>

# Steering Committee

<List the members who make up the Steering Committee. The chairperson could be the Project Sponsor. Other members could be a Project Observer, etc.>

## Project Control Board

<List the members who make up the Project Control Board>

## Project Business Owners

<List the Business owners that have been identified for the project to ensure that the project’s outcome realisation>

## Project Manager and team

<Document the project team in particular the Project Manager and other key members. If the project is large, a complete list of the project team can be included in the Appendix to the document>

## Any other key Project stakeholders

<Document any other key project stakeholders. For example might be a Working Group which will be established for a specific task. Another example would be the Project consultants who might be involved with this project>

# Tolerances

<Describe the various tolerances for each of the key aspects of the project. Some examples include; Schedule, Risk, Budget, Scope, Benefits and Quality>

# Approach

## Description of approach

<Outline how the project proposes to deliver the solution. A detailed work breakdown can be included in the appendix>

## Phase identification

<Document the forecasted dates for each of the project phases as part of the lifecycle>

# Schedule

## Gantt chart

<Add a high level summary of the Gantt Chart here also including a more detailed chart in the Appendix>

## Critical path

< Provide a summary of the critical path activities that which if not achieved will affect the overall schedule of the project. The Gantt chart should also show the key critical path items>

## Milestones

<Summarise the major milestones of the project. A Milestone spreadsheet can also be included as an Appendix>

# Resource Management

## Budget

<Describe the budget structure of the project including the amount approved and the budget breakdown for each phase/sub areas. It might also be worthwhile to indicate the project funding sources here.>

## Other Resources

<If the project needs any additional resources for example IT equipment or accommodation, it should be documented here>

# Reporting and Records

<Document the approach of reporting through the project life cycle. This would include types of reports, their audience and frequency. Also document the location where the reports will be stored>

# Key project management elements

## Issue Management Strategy

<Only a summary of the issues raised together with their management strategy should be included here while the Issue Management Strategy document if being prepared together with the Issue Register should be included as an Appendix>

## Risk Management Strategy

<Only a summary of the project risks identified together with the high level risk management strategy should be included here while the Risk Management Strategy document and the Risk Register should be included as an Appendix>

## Change Management Strategy

<Only a summary of the project’s change management strategy should be documented here. The Change Management Strategy document if being prepared should be included as an Appendix>

## Quality Management Strategy

<Only a summary of the project’s quality management strategy should be documented here. The Quality Management Strategy document if being prepared should be included as an Appendix>

## Stakeholder and Communications Management Strategy

<Only a summary of the project’s stakeholder and communications management strategy should be documented here. The Stakeholder and Communications Management Strategy document if being prepared should be included as an Appendix>

## Probity Strategy

<If the project has a probity strategy, it should be summarized here together with clearly established procedures.>

# Any other key project content

<Please add any other headings and content for any other project areas the project needs to cover, e.g. Procurement Strategy.>

# Appendices

<All relevant documentation should be included here for example Strategy documents>