

Project Management Plan

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1. Introduction

The Client has approved the Association Management Software (AMS) project to move forward for project initiation within the Developer. This project will result in the development of new AMS software and supports the Developer's corporate strategy of providing progressive solutions to clients which improve productivity in the workplace. While AMS software is currently available, the Developer believes that a dedicated client approach and resources will enable our team to develop a solution far superior to what is currently available.

The Developer has been successful because of its aggressive pursuit of product quality, ease of use, flexibility, and customer service. Additionally, customers understand that our products are adaptable and built with future growth in mind. By leveraging our reputation for superior quality and user-friendly products, and capitalizing on international resources, the Developer can position itself as the premier provider of effective and easy to use association management software in today's marketplace.

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2. Project Management Approach

The Project Manager has the authority and responsibility for managing and executing this project according to this Project Plan and its Subsidiary Management Plans. The project team will consist of personnel from the coding group, design group, and testing group. The Project Manager will work with all resources to perform project planning. All project and subsidiary management plans will be reviewed and approved by the Project Sponsor. All funding decisions will also be made by the Project Sponsor. Any delegation of approval authority to the Project Manager should be done in writing and be signed by both the Project Sponsor and Project Manager.

The project team will be a matrix in that team members from each organization continue to report to their organizational management throughout the duration of the project. The Project Manager is responsible for communicating with organizational managers on the progress and performance of each project resource.

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3. Project Scope

The scope of the AMS project includes the planning, design, development, testing, and transition of the association management software package. This software will meet or exceed organizational software standards and additional requirements established in the project charter. The scope of this project also includes completion of all documentation, manuals, and training aids to be used in conjunction with the software. Project completion will occur when the software and documentation package has been successfully executed and transitioned to the Client for dedicated use.

All project work will be performed internally and minimal outsourcing will occur during the data migration phase and only if required. The scope of this project does not include any changes in requirements to standard operating systems to run the software, software updates or revisions.

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4. Milestone List

The chart below lists the major milestones for the AMS project. This chart is comprised only of major project milestones such as completion of a project phase or gate review. There may be smaller milestones which are not included on this chart but are included in the project schedule and WBS. If there are any scheduling delays which may impact a milestone or delivery date, the Project Manager must be notified immediately so proactive measures may be taken to mitigate slips in dates. Any approved changes to these milestones or dates will be communicated to the project team by the Project Manager.

Milestone	Deliverables	Date
Inception	All project planning documentation (including Scope Management, Project Requirements, WBS, etc.) must be completed and approved	
Elaboration	Application Architecture, Database Design and GUI	
Programming	Development of the application	
External Application Interfaces	Establish interface with third party applications where required	
Validation and Testing Round 1	Unit Testing, System Testing , Integration Testing & User Acceptance Testing	
Migration and Transition	Migration from the existing IMIS System	
Documentation	User Guide, Training Guide, Help Files	
Validation and Testing Round 2	Coding and Unit testing, System Testing , Integration Testing & User Acceptance Testing	
Product Launch	Software completed and transitioned to client	

5. Schedule Baseline and Work Breakdown Structure

The WBS for the AMS Project is comprised of work packages which do not exceed 40 hours of work but are at least 4 hours of work. Work packages were developed through close collaboration among project team members and stakeholders with input from functional managers and research from past projects.

The WBS Dictionary defines all work packages for the AMS Project. These definitions include all tasks, resources, and deliverables. Every work package in the WBS is defined in the WBS Dictionary and will aid in resource planning, task completion, and ensuring deliverables meet project requirements.

The AMS Project schedule was derived from the WBS and Project Charter with input from all project team members. The schedule was completed, reviewed by the Project Sponsor, and approved and base-lined. Any proposed changes to the schedule will follow the Developer's change control process. If established boundary controls may be exceeded, a change request will be submitted to the Project Manager. The Project Manager and team will determine the impact of the change on the schedule, cost, resources, scope, and risks. If it is determined that the impacts will exceed the boundary conditions then the change will be forwarded to the Project Sponsor for review and approval. The AMS boundary conditions are:

- Cost Performance Index (CPI) less than 0.8 or greater than 1.2
- Schedule Performance Index (SPI) less than 0.8 or greater than 1.2

If the change is approved by the Project Sponsor then it will be implemented by the Project Manager who will update the schedule and all documentation and communicate the change to all stakeholders in accordance with the Change Control Process.

The Project Schedule Baseline and Work Breakdown Structure are provided in the Project Management Portal under Documentation -> Project Schedule and Documentation -> Work Breakdown Structure.

6. Change Management Plan

The following steps comprise the Developer's organization change control process for all projects and will be utilized on the AMS project:

1. Identify the need for a change (Any Stakeholder)
Requestor will submit a completed change request form to the Project Manager
2. Log change in the change request register (Project Manager)
The Project Manager will maintain a log of all change requests for the duration of the project
3. Conduct an evaluation of the change (Project Manager, Project Team, Requestor)
The Project Manager will conduct an evaluation of the impact of the change to cost, risk, schedule, and scope
4. Submit change request to Project Sponsor (Project Manager)
The Project Manager will submit the change request and analysis to the Project Sponsor for review
5. Project sponsor decision
The Project Sponsor and the Project Manager will discuss the proposed change and decide whether it will be approved based on all submitted information
6. Implement change (Project Manager)
If a change is approved by the Project Sponsor, the Project Manager will update and re-baseline project documentation as necessary as well as ensure any changes are communicated to the team and stakeholders

Any team member or stakeholder may submit a change request for the AMS Project. Any changes to project scope, cost, or schedule must meet the AMS Project Sponsor approval. All change requests will be logged in the change control register by the Project Manager and tracked through to completion whether approved or not.

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7. Communications Management Plan

This Communications Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout the life of the project and will be updated as communication requirements change. This plan identifies and defines the roles of AMS project team members as they pertain to communications. It also includes a communications matrix which maps the communication requirements of this project, and communication conduct for meetings and other forms of communication. A project team directory is also included to provide contact information for all stakeholders directly involved in the project.

The Project Manager will take the lead role in ensuring effective communications on this project. The communications requirements are documented in the Communications Matrix below. The Communications Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it, and to whom to communicate.

Communication Type	Description	Frequency	Format	Participants / Distribution	Deliverable	Owner
Weekly Status Report	Email summary of project status	Weekly	Email	Project sponsor, Team, and Stakeholders	Status Report	Project manager
Weekly Project Team Meeting	Meeting to review action register and status	Weekly	Skype	Project Team	Updated Action Register	Project manager
Project Monthly Review	Present metrics and status to team and sponsor	Monthly	Skype	Project sponsor, Team, and Stakeholders	Status and Metric Presentation	Project manager
Project Gate Reviews	Present closeout of project phases and kickoff next phase	As Needed	Skype	Project sponsor, Team, and Stakeholders	Phase completion report and phase kickoff	Project manager
Technical Design Review	Review of any technical	As Needed	Skype	Project Team	Technical Design Package	Project manager

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designs or
work
associated
with the
project

Project team directory for all communications is:

Name	Title	Email	Phone	Skype
Steven King	Project sponsor	sking@thedeveloper.ca	905-555-1234 x405	skingskype
Neil Gaiman	Project manager	ngaiman@thedeveloper.ca	905-555-1234 x501	ngaimanskype
J.K. Rowlings	Team Lead	jkrowling@thedeveloper.ca	905-555-1234 x502	jrowlingskype
Dean Koontz	.NET Developer	dkoontz@thedeveloper.ca	905-555-1234 x503	dkoontzskype
Arthur Adams	Developer Support	aadams@thedeveloper.ca	905-555-1234 x411	aadamsskype
John Byrne	UI Architect	jbyrne@thedeveloper.ca	905-555-1234 x225	jbyrneskype
Clive Barker	Testing Specialist	cbarker@thedeveloper.ca	905-555-1234 x504	cbarkerskype

7.1. Communications Conduct

7.1.1. Meetings

The Project Manager will distribute a meeting agenda at least 2 days prior to any scheduled meeting and all participants are expected to review the agenda prior to the meeting. During all project meetings the timekeeper will ensure that the group adheres to the times stated in the agenda and the recorder will take all notes for distribution to the team upon completion of the meeting. It is imperative that all participants arrive to each meeting on time and all cell phones and blackberries should be turned off or set to vibrate mode to minimize distractions. Meeting minutes will be distributed no later than 24 hours after each meeting is completed.

7.1.2. Project Management Portal

All correspondence, suggestions, written discussions and documentation should be recorded and managed via the Project Management Portal. The Project

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Manager should be included on any email notification regarding the addition of information to the Project Management Portal.

7.1.3. Email

In the case where email correspondence is necessary, all email pertaining to the AMS Project should be professional, free of errors, and provide brief communication. Email should be distributed to the correct project participants in accordance with the communication matrix above based on its content. All attachments should be in one of the organization's standard software suite programs and adhere to established company formats. If the email is to bring an issue forward then it should have a descriptive subject line, discuss what the issue is, provide a brief background on the issue, and provide a recommendation to correct the issue. The Project Manager should be included on any email pertaining to the AMS Project.

7.1.4. Informal Communications

While informal communication is a part of every project and is necessary for successful project completion, any issues, concerns, or updates that arise from informal discussion between team members must be communicated to the Project Manager so the appropriate action may be taken.

8. Cost Management Plan

The Project Manager will be responsible for managing and reporting on the project's cost throughout the duration of the project. The Project Manager will present and review the project's cost performance during the monthly project status meeting. Using earned value calculations, the Project Manager is responsible for accounting for cost deviations and presenting the Project Sponsor with options for getting the project back on budget. All budget authority and decisions, to include budget changes, reside with the AMS Project Sponsor.

For the AMS Project, control accounts will be created at the fourth level of the WBS which is where all costs and performance will be managed and tracked. Financial performance of the AMS Project will be measured through earned value calculations pertaining to the project's cost accounts. Work started on work packages will grant that work package with 50% credit; whereas, the remaining 50% is credited upon completion of all work defined in that work package. Costs may be rounded to the nearest dollar and work hours rounded to the nearest whole hour.

Cost and Schedule Performance Index (CPI and SPI respectively) will be reported on a monthly basis by the Project Manager to the Project Sponsor. Variances of 10% or +/- 0.1 in the cost and schedule performance indexes will change the status of the cost to yellow or cautionary. These will be reported and if it's determined that there is no or minimal impact on the project's cost or schedule baseline then there may be no action required. Cost variances of 20%, or +/- 0.2 in the cost and schedule performance indexes will change the status of the cost to red or critical. These will be reported and require corrective action from the Project Manager to bring the cost and/or schedule performance indexes back in line with the allowable variance. Any corrective actions will require a project change request and be must approved by the Project Sponsor before it can be implemented.

Earned value calculations will be compiled by the Project Manager and reported at the monthly project status meeting. If there are indications that these values will approach or reach the critical stage before a subsequent meeting, the Project Manager will communicate this to the Project Sponsor immediately.

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9. Procurement Management Plan

The Project Manager will provide oversight and management for all procurement activities under this project. The Project Manager is authorized to approve all procurement actions up to \$1,000. Any procurement actions exceeding this amount must be approved by the Project Sponsor.

While this project requires minimal or no procurement, in the event procurement is required, the Project Manager will work with the project team to identify all items or services to be procured for the successful completion of the project. The Project Manager will then ensure these procurements are reviewed by the Project Sponsor. The Project Sponsor will review the procurement actions, determine whether it is advantageous to make or buy the items or resource required services internally, and begin the vendor selection, purchasing and the contracting process.

In the event that procurement becomes necessary, the Project Manager will be responsible for management of any selected vendor or external resource. The Project Manager will also measure performance as it relates to the vendor providing necessary goods and/or services and communicate this to the Project Sponsor.

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10. Project Scope Management Plan

Scope management for the AMS Project will be the sole responsibility of the Project Manager. The scope for this project is defined by the Scope Statement, Work Breakdown Structure (WBS) and WBS Dictionary. The Project Manager, sponsor, and stakeholders will establish and approve documentation for measuring project scope which includes deliverable quality checklists and work performance measurements.

Proposed scope changes may be initiated by the Project Manager, stakeholders or any member of the project team. All change requests will be submitted to the Project Manager who will then evaluate the requested scope change. Upon acceptance of the scope change request, the Project Manager will submit the scope change request to the Project Sponsor for acceptance. Upon approval of scope changes by the Project Sponsor, the Project Manager will update all project documents and communicate the scope changes to all stakeholders. Based on feedback and input from the Project Manager and stakeholders, the Project Sponsor is responsible for the acceptance of the final project deliverables and project scope.

The Project Sponsor is responsible for formally accepting the project's final deliverable. This acceptance will be based on a review of all project documentation, testing results, beta trial results, and completion of all tasks/work packages and product functionality.

11. Schedule Management Plan

Project schedules for the AMS Project will be created using MS Project Professional starting with the deliverables identified in the project's Work Breakdown Structure (WBS). Activity definition will identify the specific work packages which must be performed to complete each deliverable. Activity sequencing will be used to determine the order of work packages and assign relationships between project activities. Activity duration estimating will be used to calculate the number of work periods required to complete work packages. Resource estimating will be used to assign resources to work packages in order to complete schedule development.

Once a preliminary schedule has been developed, it will be reviewed by the project team and any resources tentatively assigned to project tasks. The project team and resources must agree to the proposed work package assignments, durations, and schedule. Once this is achieved the Project Sponsor will review and approve the schedule and it will then be base lined.

In accordance with the Developer's organizational standard, the following will be designated as milestones for all project schedules:

- Completion of scope statement and WBS/WBS Dictionary
- Base lined project schedule
- Approval of final project budget
- Project kick-off
- Approval of roles and responsibilities
- Requirements definition approval
- Completion of data mapping/inventory
- Project implementation
- Acceptance of final deliverables

Roles and responsibilities for schedule development are as follows:

The Project Manager will be responsible for facilitating work package definition, sequencing, and estimating duration and resources with the project team. The Project Manager will also create the project schedule using MS Project Professional and validate the schedule with the project team, stakeholders, and the Project Sponsor. The Project Manager will obtain schedule approval from the Project Sponsor and baseline the schedule.

The project team is responsible for participating in work package definition, sequencing, duration, and resource estimating. The project team will also review and validate the proposed schedule and perform assigned activities once the schedule is approved. The Project Sponsor will participate in reviews of the proposed schedule and approve the final schedule before it is

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base lined. The project stakeholders will participate in reviews of the proposed schedule and assist in its validation.

12. Quality Management Plan

All members of the AMS project team will play a role in quality management. It is imperative that the team ensures that work is completed at an adequate level of quality from individual work packages to the final project deliverable. The following are the quality roles and responsibilities for the AMS Project:

The Project Sponsor is responsible for approving all quality standards for the AMS Project. The Project Sponsor will review all project tasks and deliverables to ensure compliance with established and approved quality standards. Additionally, the Project Sponsor will sign off on the final acceptance of the project deliverable.

The Project Manager is responsible for quality management throughout the duration of the project. The Project Manager is responsible for implementing the Quality Management Plan and ensuring all tasks, processes, and documentation are compliant with the plan. The Project Manager will work with the project's Quality Specialists to establish acceptable quality standards. The Project Manager is also responsible for communicating and tracking all quality standards to the project team and stakeholders.

The Quality Specialists are responsible for working with the Project Manager to develop and implement the Quality Management Plan. Quality specialists will recommend tools and methodologies for tracking quality and standards to establish acceptable quality levels. The Quality Specialists will create and maintain Quality Control and Assurance Logs throughout the project.

The remaining members of the project team, as well as the stakeholders will be responsible for assisting the Project Manager and Quality Specialists in the establishment of acceptable quality standards. They will also work to ensure that all quality standards are met and communicate any concerns regarding quality to the Project Manager.

Quality control for the AMS Project will utilize tools and methodologies for ensuring that all project deliverables comply with approved quality standards. To meet deliverable requirements and expectations, we must implement a formal process in which quality standards are measured and accepted. The Project Manager will ensure all quality standards and quality control activities are met throughout the project. The Quality Specialists will assist the Project Manager in verifying that all quality standards are met for each deliverable. If any changes are proposed and approved by the Project Sponsor, the Project Manager is responsible for communicating the changes to the project team and updating all project plans and documentation.

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Quality assurance for the AMS Project will ensure that all processes used in the completion of the project meet acceptable quality standards. These process standards are in place to maximize project efficiency and minimize waste. For each process used throughout the project, the Project Manager will track and measure quality against the approved standards with the assistance of the Quality Specialists and ensure all quality standards are met. If any changes are proposed and approved by the Project Sponsor, the Project Manager is responsible for communicating the changes to the project team and updating all project plans and documentation.

13. Risk Management Plan

The approach for managing risks for the AMS Project includes a methodical process by which the project team identifies, scores, and ranks the various risks. Every effort will be made to proactively identify risks ahead of time in order to implement a mitigation strategy from the project's onset. The most likely and highest impact risks were added to the project schedule to ensure that the assigned risk managers take the necessary steps to implement the mitigation response at the appropriate time during the schedule. Risk managers will provide status updates on their assigned risks in the bi-weekly project team meetings, but only when the meetings include their risk's planned timeframe.

Upon the completion of the project, during the closing process, the Project Manager will analyze each risk as well as the risk management process. Based on this analysis, the Project Manager will identify any improvements that can be made to the risk management process for future projects. These improvements will be captured as part of the lessons learned knowledge base.

13.1. Risk Register

The Risk Register for this project is provided in the Project Management Portal under Documentation -> Risk Register.

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14. Staffing Management Plan

The AMS Project will consist of a matrix structure with support from various internal organizations. All work will be performed internally. Staffing requirements for the AMS Project include the following:

Project Manager (1 position) – responsible for managing all facets of the AMS Project. The Project Manager is responsible for planning, creating, and/or managing all work activities, variances, tracking, reporting, communication, performance evaluations, staffing, and internal coordination with functional managers.

Team Lead/Programmer (1 position) – responsible for oversight of all coding and programming tasks for the AMS Project as well as ensuring functionality is compliant with quality standards. Responsible for working with the Project Manager to create work packages, manage risk, manage schedule, identify requirements, and create reports. The Team Lead/Programmer will be managed by the Project Manager who will provide performance feedback to the functional manager.

Programmer (1 position) – responsible for coding and programming for the AMS Project. All coding and programming tasks will be reviewed by the Team Lead/Programmer prior to implementation. Responsibilities also include assisting with risk identification, determining impacts of change requests, and status reporting. The Programmer will be managed by the Project Manager and feedback will be provided to the functional manager for performance evaluations by the Project Manager and Team Lead/Programmer.

Quality Specialist (1 position) – responsible for assisting the Project Manager in creating quality control and assurance standards. The Quality Specialist is also responsible for maintaining quality control and assurance logs throughout the project. The Quality Specialist will be managed by the Project Manager who will also provide feedback to the functional manager for performance evaluations.

Technical Writer (1 position) – responsible for compiling all project documentation and reporting into organizational formats. Responsible for assisting the Project Manager in Configuration Management and revision control for all project documentation. Responsible for scribing duties during all project meetings and maintaining all project communication distribution lists. The Technical Writer will be managed by the Project Manager who will also provide feedback to the functional manager for performance evaluations.

Testing Specialist (1 position) – responsible for helping establish testing specifications for the AMS Project with the assistance of the Project Manager and Programmers. Responsible for ensuring all testing is complete and documented in accordance with established standards.

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Responsible for ensuring all testing resources are coordinated. The Testing Specialist will be managed by the Project Manager who will also provide feedback to the functional manager for performance evaluations.

The Project Manager will negotiate with all necessary functional managers to identify and assign resources for the AMS Project. All resources must be approved by the appropriate functional manager before the resource may begin any project work. The project team will not be co-located for this project and all resources will remain in their current workspace.

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15. Resource Calendar

The AMS Project will require all project team members for the entire duration of the project, although levels of effort will vary as the project progresses. The Project is scheduled to last 25 weeks with standard 40 hour work weeks. If a project team member is not required for a full 40 hour work week at any point during the project, their efforts outside of the AMS Project will be at the discretion of their Functional Manager.

<<< INSERT RESOURCE CALENDAR HERE >>>

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16. Cost Baseline

The cost baseline for the AMS project includes all budgeted costs for the successful completion of the project.

Project Phase	Budgeted Total	Comments
Planning	\$	Includes work hours for all project team members for gathering requirements and planning project
Design	\$	Includes work hours for all project team members for work on AMS conceptual design
Programming	\$	Includes all work hours for the programming of AMS
Testing	\$	Includes all work hours for testing (including beta testing) of AMS software
Documentation	\$	Includes all work hours for documenting of AMS software
Transition and Closeout	\$	Includes all work hours for transition to client and project closeout

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17. Quality Baseline

The AMS Project must meet the quality standards established in the quality baseline. The quality baseline is the baseline which provides the acceptable quality levels of the AMS Project. The software must meet or exceed the quality baseline values in order to achieve success.

Item	Acceptable Level	Comments
User Features	99% of requested features implemented as requested	
Compatibility	No errors associated with running software with compatible applications	Includes APIs of third party products
Supporting Documentation	Less than 1% failure rate in beta testing new users to run setup and execute software functionality	

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18. Sponsor Acceptance

Approved by the Project Sponsor:

Date: _____