

## **Content of the Project Plan**

This is intended to give guidance on the content of the Project Plan, against each of the Plan headings specified. Each Topic should be addressed, although the size and nature of the Project will determine the level of detail specified in each section. If the Project Plan is part of the Quality Plan (QP), then these topics will become sub-headings within a section of the QP devoted to the planning activities.

Note – the Prince 2(tm) method surrounds this project plan exercise, however, this document gives more information on the actual work that needs to be carried out to produce a good project plan.

The use of Microsoft Project is recommended to support various sections of the Plan. This tool is particularly relevant on larger projects, as schedules are subject to a continual change / review / update process, which can be time consuming and costly task.

### ***Define the Work to be Done in a Project Plan***

The Project Plan should ensure that the contractual requirements of the project are completely fulfilled. On a large project a project plan may be produced for each identified sub-system which constitutes part of the overall plan.

The Project Plan should complement the Quality Plan and the duplication of information or instructions should be avoided. In simple terms the Project Plan details the what, why, where and when aspects. The Quality Plan determines the project policy and aspects of the how and who.

The nature, size and scope of individual projects varies enormously and this will be reflected in the complexity of the project plan. On larger projects a ‘top down’ approach should be used where a high level Project Plan will refer to lower level Project Plans.

Often it is only the project programme or schedule that the client sees. If this is incorporated in a Project Plan then it provides a powerful tool to ensure the Client understands the external dependencies on the project and the impact of any delays in external bodies – e.g. the client himself, meeting those timescales.

### ***Section 1 – Project Overview.***

Unless the Project Plan is part of the QP, the first section of the document should be a brief overview. The topics that should be addressed are:

- The identification of the project title, job number, contract number and customer

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- Brief description of the overall task of the project, giving outline information on the system / hardware / consultancy, providing relevant background detail where appropriate.
- Overview of major milestones and deliverables.
- The identification of any major issues (e.g. high risk / tight timescales etc).
- The identification of major sub – contractor(s)
- The identification of any teaming arrangement(s)
- The identification of any Client dependencies.
- The scope of the Plan in relation to the whole project (e.g. high or low level)
- The hierarchical structure of project planning documentation, in order that all associated plans may be identified.

Although it may appear to overlap with parts of other documents, it is useful to give a brief description of the work involved, background information and major events and issues involved, to provide the reader with some appreciation of the detail that is shown later.

## **Section 2 – Milestones / Deliverables**

This section will identify the following:

- External milestones
- Internal Milestones
- All deliverables to the client
- All deliverables to the sub-contractors

External milestones may be dictated by the client e.g. a fixed date for a particular deliverable. External milestones that are “stage payments” should have a clear definition of the precise requirements necessary for achieving the claim. This will provide visibility to all staff, and the client, their responsibilities in meeting the milestones. Tangible internal deliverables should also be specified so that there is no doubt that a particular milestone has been reached.

An unambiguous statement of each deliverable will identify the contractual requirements. If the client has to authorise the Project Plan, then he/she will have no doubt as to what the output of the project will be. Project members will also understand the output from the project and this will put into context the tasks required to achieve them.

A statement of all deliverables expected from our sub-contractor(s) must also be inserted in this section, in the same unambiguous manner, taken from *their* Project Plan!

When setting the milestone dates, always ensure that the agreed time scale contingency has been included in the estimates of work leading to the milestone. Client plans will be based on these milestone dates, therefore we must aim to complete every one successfully to avoid his embarrassment as well as our own!

Those external tasks which the project will rely on to be completed, on time, in order to fulfil its own programme, must be listed. This will allow the client and internal management to appreciate their responsibilities and the possible consequences if their particular dependency target date is not met.

The dependencies will be illustrated at the detailed planning stage.

The risk factor of dependencies not being met, the possible outcome and what actions may be taken will be described.

Realistic time scales must be allowed for Client authorisation of project documentation. If the target is unreasonable it will not be met and all following related tasks will be delayed. The plan must make client to the client what is required and the impact if there is a failure to deliver.

### **Section 4 – Assumptions / Restrictions**

No plan can be produced without some basic assumptions being made or some restrictions being imposed. This section should detail those assumptions and restrictions providing visibility to both management and staff of those factors for the impact the ability to meet the customer requirements. It may be appropriate for the client to agree the assumptions on which the programme is based by authorising the plan.

Assumptions and restrictions are likely to cover technical and management aspects of the project and may also include factors about methodologies. Any subsequent replanning may be seriously affected if these factors are not recorded accurately. A complete list should be generated and kept up to date when the plan is revised. If any of these assumptions or restrictions become invalid then the plan can be re-assessed.

If the significant factors are recorded, then there is less chance of staff being pressured into accepting an ill-advised change through forgetfulness.

Another important assumption which will be documented is the resource profile and the anticipated level of skill / security on which the plan is being based.

### **Section 5 – Work Breakdown Structure.**

A Work Breakdown Structure (WBS) describes the project activities in a top down hierarchical manner. It is a structured format where groups of related tasks are broken down into levels of increasing detail, each with unique identifiers. Each task identified in the WBS should have a defined output or “Milestone” which is related to a project deliverable. **These “Milestones” allow progress on the project to be monitored against clearly defined goals.**

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Major tasks, leading to a Milestone, must be fully defined so that all the activities can be identified and the resources required planned for in the project schedule. Sufficient information should be contained in each description so that the Project Manager can write an appropriate instruction for completion of that task. Each task should be capable of being subjected to the following analysis:

- The entry conditions are fully definable
- The activities required are fully definable / defined
- The validation necessary to confirm that the task has been completed satisfactorily
- The deliverable from the task is clearly identifiable

Each major task should be as autonomous as possible since the absence of inter-relating dependencies significantly eases the management of the work.

Once the WBS has been generated, the programme schedule can be linked together in a logical manner. Each major task on the WBS should be assigned to a single responsible person identified on the project organisation chart. This chart and the project staff responsibilities should be detailed in, or referenced from, the Quality Plan.

A referencing scheme should be adopted on the WBS to aid reading. This should follow a format prescribed as headers in the Project Quality Plan.

## **Section 6 – Programme Schedules**

This is normally the most detailed section in the plan, often based on a Gannt Chart, showing the inter-related timings of the project tasks. The schedules for each WBS task should show the timescales of all activities and their interdependencies.

The WBS and Schedule sections of the Project Plan are both subject to frequent review / change and may be a separate document in their own right. **If incorporated in the plan, then reference should be made to the fact that this is the first or initial version of the schedule and reference should be made to where the latest version may be located.**

The guidance given in the following sub-sections should not trivialise the complex processes involved when planning a task, rather it outlines the need to have some structure to the planning process and gives some guidance in this area. The fact that the project plan is a living document and the subject of frequent review and update enables the benefits of a computer based environment, such as Microsoft Project, to be realised.

### ***How to Establish a Programme Schedule.***

The basic premise for planning the execution of a project is outlined below:

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- Set up the WBS from the top down to the lowest level that can be confidently estimated. As a guide, the lowest level tasks on the WBS should consist of activities of approximately 5 days duration (to be executed in the near future).
- Define the scope of the indentified blocks from the top down and their relationship to each other.
- Identify dependencies, both internal and external, and identify the assumptions and restrictions that must be considered.
- Draw up a relational time dependant network, preferable using the Gantt Chart and Resource planning facilities of Microsoft Project
- Time analyse the network – identify any shortcomings, identify the critical path, identify initial time contingency, overlap of start / end dates, etc.
- Resource analyse the network – identify resource loading, obtain staffing profile, identify levels of expertise etc.
- Repeat the process until the whole plan contains all the elements required in order to produce the deliverables to time and budget
- Obtain approval / authorisation – having reviewed the plan with your manager, obtaining their recorded agreement.

The old adage of “plan, plan and stick to the plan” is still true, however, the plan must be subject to regular review. The Project Manager is responsible for ensuring that any changes within the project are reflected in the current Project Plan.

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