



Planning Your Complex IT Projects Made Simple

Project Planning Template

The Basics of Project Planning

Introduction

Project planning is the first activity that we have to do before commencement of any project. Any project manager, experienced or a novice understands the utmost importance of proper project planning. A comprehensive project planning covers almost every aspect necessary in successful completion of the project (eg. tasks, milestones, schedules, risks, communication, quality, etc.). Often the project plan prepared at the start is referred and followed by the project team until the project is completed.

About Project Planning

Usually project planning used to be perceived as preparing GNATT chart alone. This in fact is a wrong practice, as GNATT Chart represents a mere visual representation of project schedule. Project plan is definitely a broader and comprehensive concept that focuses on

- Scope of the Project
- Project Schedule
- Resource Allocation
- Work Breakdown Schedule
- Project Cost Estimation
- Quality Analysis Planning
- Budgeting, etc.

Benefits of Project Planning

- Increase in number of projects for achieving expected benefits, on time, on budget & within scope
- Alignment of project investment to corporate strategy
- Efficient management of company resources: human, technical and financial
- Decreased risk exposure,
- Reduction in project overhead/bureaucracy & elimination of heavy process for its own sake
- Increase in organization's ability to plan using future project deliverables

Initial Consideration

Project Summary:

Create an IT project summary containing estimated value of the project, deliverables, purpose, goals, and acceptance, duration, as well as completion criteria of the project. Getting a brief idea about the major dependencies or constraints helps in planning a project effectively.

Project Summary Sample:

Project Name:	<input style="width: 95%;" type="text"/>	Start Date:	<input style="width: 95%;" type="text"/>
State Organization:	<input style="width: 95%;" type="text"/>	Initiated By:	<input style="width: 95%;" type="text"/>
Client Name:	<input style="width: 95%;" type="text"/>	Awarded On:	<input style="width: 95%;" type="text"/>
Point of contact:			
Position	Name/Organization	Contact Number	E-Mail

Project Goals:

Define the expected project outcome in lieu with the common development constraints. Refer to Project Proposal, Project Requirement Specification or the Project Feasibility report for additional information. List only important project goals such as Functional, Strategic, Business, Technological, Quality and Organizational Goals. Prioritize each goal for better understanding.

Project Goal	Priority	Comment/Reference/Description
Functional Goals		
<Functional Goal #1>		
<Functional Goal #2>		
Business Goals		
<Time-to-Market>		
<Efficiency/Cost/Quality>		
Technological Goals		
<Technical Goal #1>		
Quality Goals		
<Quality Goal #1>		

Identify the Constraints:

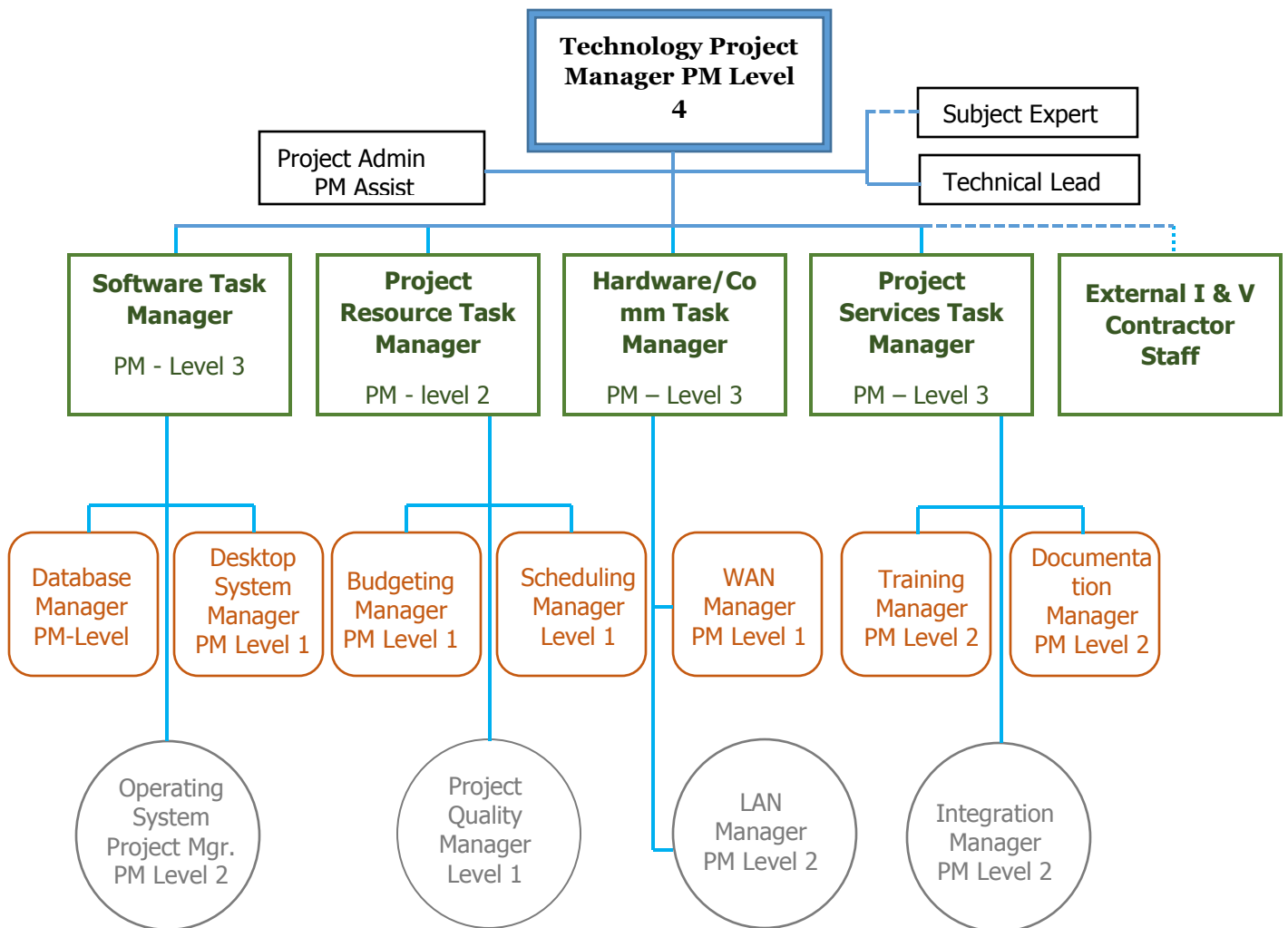
With a significant amount of information synthesize and then make a complex judgment about the constraints or barriers that might hinder the project development cycle. Demands of stakeholders, likely availability of resources, flexibility in time, outcomes and costs

Constraints	Priority	Comments/Reference
<Project Specific Standards>		
<Environmental>		
<Compliance Standards>		
<Time/Cost/Resource/Outcomes>		

Systemic Planning

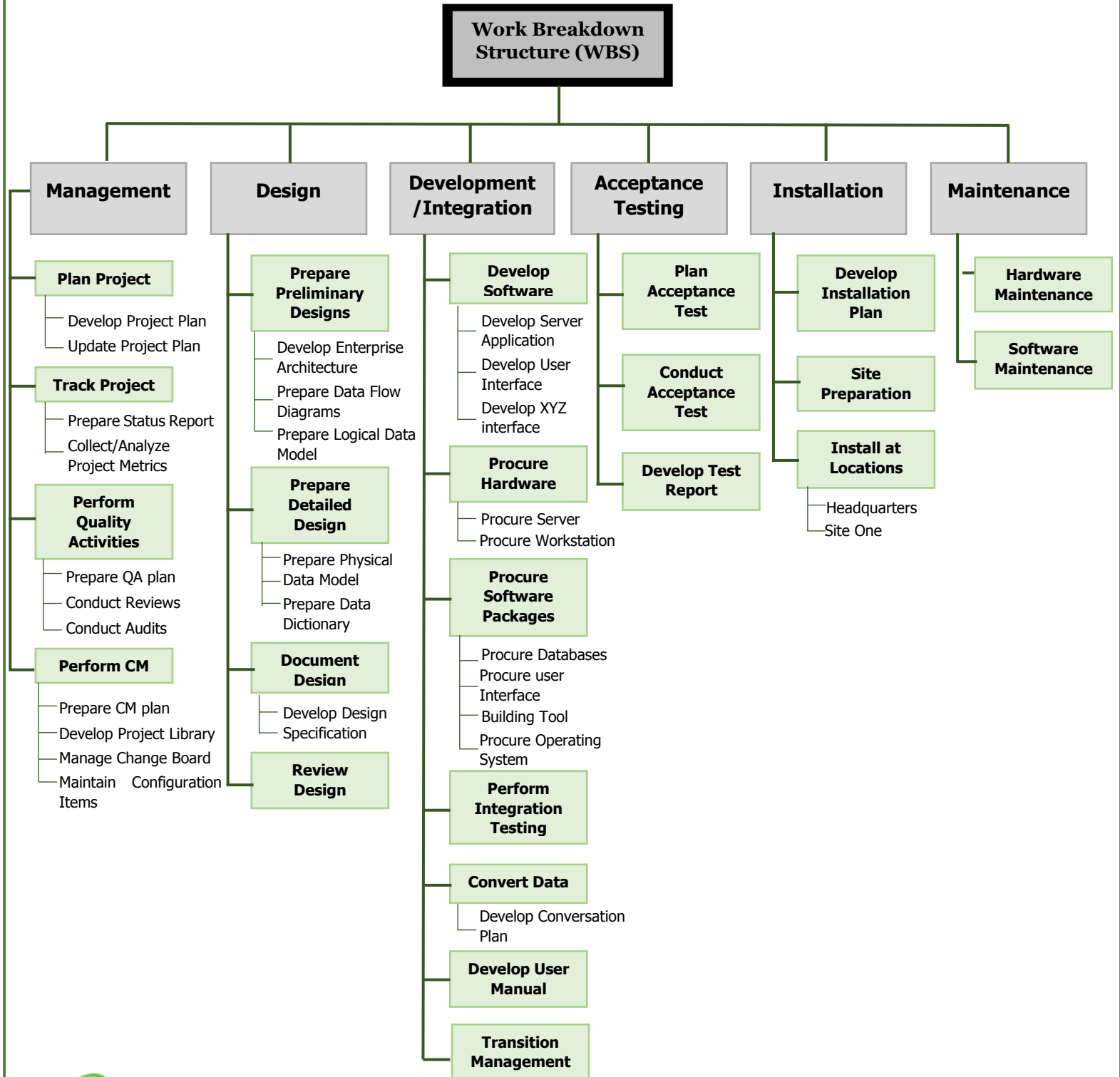
Project Organization:

Describe how you are going to organize a project along with subprojects. Additionally, describe planning for other areas of responsibility by identifying and staffing the steered functions, project management functions, and execution functions.



Work Breakdown Structure (WBS):

The work breakdown structure describes each activity necessary in project planning. If the project is big, consider including work packages with suitable description displaying how a specified project team will complete specific tasks. These work packages describe necessary to schedule; identify requirements to be completed and specific work that needs to be completed.



Activity List:

Sequence the activities by dividing the project into smaller, more manageable components/activities and then specify the order of completion. Following chart describes each activity necessary to complete the project with a reference to statement of work. You can include work packages for large projects describing how specifically the task will be completed by allocated project teams.

Activity	Activity Name	Description of Activity Name	# of Days	Start Date	Milestones
	Design	System Architecture	XX	dd/mm/yy	Detailed Design
	Develop	System Development	XX	dd/mm/yy	Software Code
	Code	Code Sub-routine	XX		
	Integrate	Integrate Sub-routine	XX		
	Testing	Testing System	XX	dd/mm/yy	Complete Acceptance Testing of Doc.
	Installation	State Rollout	XX	dd/mm/yy	
	Pilot	Pilot Installation	XX	dd/mm/yy	
	Area	Statewide Installation	XX	dd/mm/yy	Installation Certificate
	Support	Provide User Support	XX	dd/mm/yy	
	Training	Provide User Training	XX	dd/mm/yy	Training Certificate
	Close-out	Transfer System to Operations	X	dd/mm/yy	

Work Product Identification:

Prepare a list of project deliverables having due dates and name of the person responsible for the delivery. Derive the information from Project Activity List and expand it to accommodate deliverable assignments offered to a specific author and track the delivery of the document.

Deliverable Name	Due Date	Date Delivered	Point of Contact
Design Document	dd/mm/yy	dd/mm/yy	Mr. ABC
Test Plan	dd/mm/yy	dd/mm/yy	Mr. ABC
Installation Plan	dd/mm/yy	dd/mm/yy	Mr. ABC
Source Code	dd/mm/yy	dd/mm/yy	Mr. ABC
Installation Certificate	dd/mm/yy	dd/mm/yy	Mr. ABC
Training Plan	dd/mm/yy	dd/mm/yy	Mr. ABC
Training Certificate	dd/mm/yy	dd/mm/yy	Mr. ABC



Schedule and Milestones:

Plan the activity sequencing after estimating the amount of efforts required to complete the project activities successfully. Now prepare a detailed schedule supporting all of the required activities, at the same time complying with the resource plan. Ensure to define the project milestones based on the chosen development strategy as well as considering the critical events in the project schedule. List the milestones and define clear milestone criteria to make milestones measurable.

Milestones	Description	Milestone Criteria	Planned Date
M0	Start Project	Budget Release	(dd/mm/yy)
	Define the scope and goals of the project	Project Requirement Specification reviewed, stakeholders identified and proposal reviewed	(dd/mm/yy)
M1	Start Planning		(dd/mm/yy)
	<Describe Milestone, as if Life Cycle Objective, LCO Defined>	Described Scope and Concept behind project development	(dd/mm/yy)
M2	Start Execution		(dd/mm/yy)
	<Describe Milestone, as if Life Cycle Architecture LCA Defined>	Agreed to the requirements, reviewed project plan, and committed resources	(dd/mm/yy)
M3	Confirm Execution		(dd/mm/yy)
	<Describe Milestone, as alpha version of the product>	Architecture reviewed and is stable	(dd/mm/yy)
M4	Start Introduction		(dd/mm/yy)
	<Describe Milestone, as product passed system test>	Coding of new functionality finished, drafting documentation	(dd/mm/yy)
M5	Release Product		(dd/mm/yy)
	<Describe Milestone, as product fully tested and ready for delivery>	Product system thoroughly tested and documents reviewed	(dd/mm/yy)
M6	Close Project		(dd/mm/yy)

Budget:

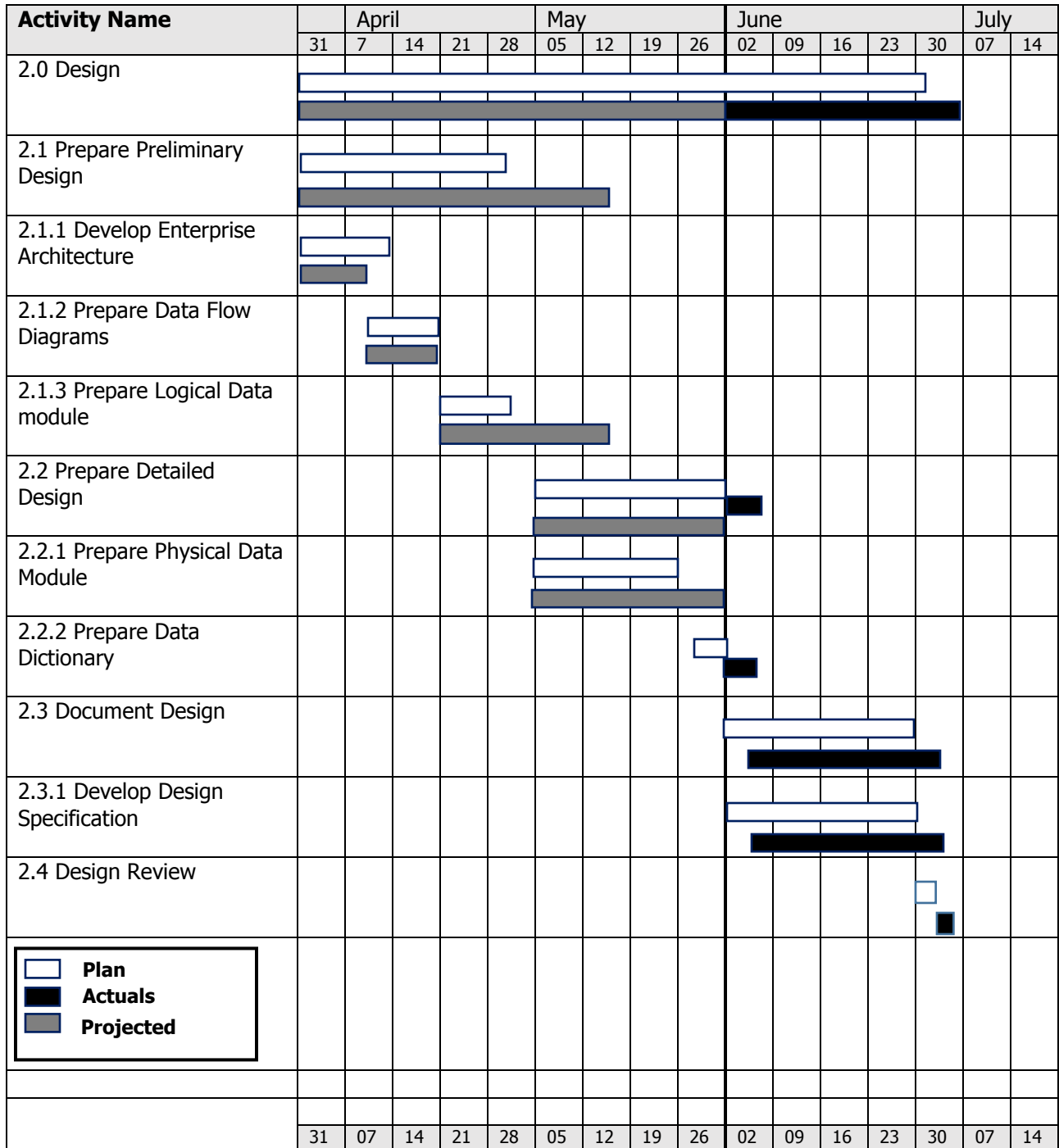
Project budget can be calculated based on the cost estimates for different project activities, subcontracts, training, Commercial off the Shelf (COTS), etc. Ensure that the document for budget distribution is available and open for the entire project life.

Category	Budget for Specified Period in US \$					
	M0 - M1	M1 - M2	M2 - M3	M3 - M4	M4 - M5	M5 - M6
Human Resource (Internal)						
Human Resource (External)						
Purchase (COTS)						
Equipment						
Premises						
Tools						
Travel Costs						
Training						
Review Activities						
Other						
Total						
Total Cumulated						



GANTT chart – Project Schedule:

Preparing a Gantt chart has been one of the most popular and useful ways of showing project activities (tasks/events) displayed against time. The left side of the chart lists activities and on the top is suitable time scale. More often, each activity is displayed using a bar, the length and position of the bar reflect the start date, duration and end date of the specified activity. A GANTT Chart allows you to keep a track of various activities in the project plan, start and end of each activity, point where activities overlap with other tasks and how much as well as the start and end date of the entire project.



Risk Identification:

Describe the possible risks and procedures likely to be used to manage them. Ensure a thorough procedure specifying responsibility of the particular risk management after considering a risk situation at project meetings. Prepare a risk management plan, listing all possible risks, accesses, mitigation and a defined contingency plan.

Category	Prob	Imp	Risk	Mitigation Approach
MANAGEMENT				
Personnel Availability	High	Med	System developing personnel's failed to attend design related meeting, hence possible risk of less understanding of functionality	Create a specification document containing sufficient information allowing personnel to understand the system functionality
Personnel Skills	Low	High	Personnel assigned to project do not have compatible skills to perform the tasks	Contractor provided quality personnel in design anticipating their skills will be met
Schedule	Med	High	Failure to deliver the completed system in a timeframe of 18 months	Projects is broken into smaller segments ensuring it is on schedule
Cost	Med	High	Proposed budget failed to reflect all required activities	Costing is reviewed to make sure all project planning activities are included
Change Control	Med	Med	Possibility of change in system requirements during the development time	A change control process is established limiting the changes essential to business.

Communication & Reporting:

Align principles for reporting and distributing information within the project for different groups of internal and external stakeholders. It would be better if you mention how often the communication/reporting will take place, type of reports or information, tools used for communication and the type of type of meetings that will take place.

Type of Communication	Method /Tool	Frequency /Schedule	Information	Participants /Responsibilities
Internal Communication				
Project Meetings	Teleconference	Weekly and on events	Project Status, Problems, risks, & changed requirements	Project Manager Project Team
Sharing Project Data	Shared Project Server	Whenever available	All Project Documentation and Reports	Project Manager(s) Team Members
Milestone Meetings	Teleconference	Before Milestones	Project Status (Progress)	Project Manager Sub Project Mgr.
Final project Meeting	Teleconference	M6	Wrap-up Experience	Project Manager Project Team
External Communication & Reporting				
Project Report	Excel Sheet		Project Status including Progress, Forecast and Associated Risks	Project Manager Sub-Project Managers
SteCO Meetings	Teleconference, Video call, Skype Call			Project Manager, SteCo.

Estimated Cost at Completion:

It is an assessment of the costs involved at the end of project in terms of either time or dollar. Here is a template that provides space for both types of analyses.

WBS	Activity Description	Analysis in Hours						Analysis in Dollars				
		Res #	Budget Hours	Actual Hours	Est to Complete	Est @ Complete	Variance (+ =More)	Budget Hours	Actual Hours	Est to Compete	Est @ Complete	Variance (+ =More)
2.0	Design											
2.1	Prepare Preliminary Design											
2.1.1	Develop Enterprise Architecture											
2.1.2	Prepare Data Flow Diagrams											
2.1.3	Prepare Logical Data Module											
2.2	Prepare Detailed Design											
2.2.1	Prepare Physical Data Model											
2.2.2	Prepare Data Dictionary											
2.3	Document Design											
2.3.1	Develop Design Specification											
2.4	Design Review											
Total for the Project												



Configuration Management Planning:

Define the person responsible for project configuration management in a detailed configuration management plan. The plan should also include the probable procedures to be used for configuration management, planned configuration items, planned release dates for configuration items, and resources required to carry out configuration management.

CM Responsibility Manager:

Additional Staff for CM:

Procedure Reference:

**Configuration Items: Please ensure that the CM is implemented throughout the project lifecycle*

No.	ITEM	COMMENTS
1	System/Management/PPlan	Project Plan
2	System/Requirement/Sys Spec	System Specification
3	System/Test/TPlan	Test Plan
4	System/Management/TPlan	Implementation

** Briefly describe about the repository where you plan to store the configuration items and CM Records*

** Keep scope for QA Audits, occurring as per the project schedule*

Quality Analysis Planning:

A quality plan defines the person responsible for carrying out QA activities for the project. In addition to that, explains procedures you will be using, planned quality activities and resources necessary to conduct QA activities.

QA Responsibility Manager:

Additional Staff for CM:

Procedure Reference:

**Planned Quality Event: Please ensure that the QA activities are implemented throughout the project lifecycle. Include dates for QA audits and reviews, design walkthroughs and other project activities participated by QA Staff.*

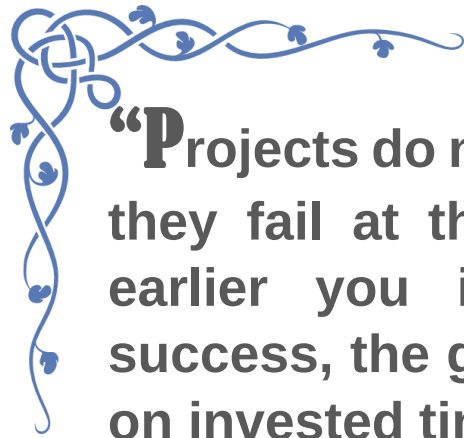
No.	ITEM	COMMENTS
1	Requirement Review	Due dd/mm/yy
2	Code Walk Through	dd/mm/yy
3	User Interface Prototype	dd/mm/yy
4	Testing Audit	dd/mm/yy

** Briefly describe about the repository where you plan to store the configuration items and associated QA records. Mention if QA record are stored with project CM Material.*

** Highlight the regularity of QA Audits, Baselines and the CM activities. If you have a planned schedule for QA, activities define it in detail.*

This project plan template forms the basis of for all management efforts associated with the project. A sample project plan template is provided in this document, which contains informational plan required to plan and execute IT projects in varying degrees. The exact format of the planning information may vary from template to template depending on either your project or your requirements.

Remember this plan template published by Symphony Solutions emphasizes documenting only the pertinent information associated with the plan. Please be advised that the information associated with project plan evolve in its lifecycle as it moves within different project activities updating ne information.



“Projects do not fail at the end... they fail at the beginning. The earlier you invest in project success, the greater your return on invested time will be”.

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