

Project Plan template

<organisational unit 1>
<organisational unit 2>
<Author>

<V1.0-1 Draft>
<confidentiality class>
<yyyy-mm-dd>

<Project's name>

(<Project ID>)

Project plan

<Customer>

<IT system etc. to be delivered>

Table of Contents

1 Project summary	4
1.1 Project background	4
1.2 Project priority	5
2 Project scope	5
2.1 Project objective(s)	5
2.2 Scope and deliverables.....	5
2.3 Exclusions.....	6
2.4 Preconditions and outer dependencies	6
3 Project schedule.....	7
3.1 Project phasing, dependencies and schedule	7
3.2 Decision points and milestones	7
3.3 Schedule tracking	8
4 Project cost	8
5 Project resources	8
5.1 Project organisation	8
5.1.1 Staffing plan	11
5.1.2 Training & competency requirements	11
5.1.3 Competence development	11
5.2 Work environment.....	12
5.3 Purchases and subcontracting work.....	12
6 Project risks and management	13
7 Project quality objectives and management	13
8 Project development and management processes	13
8.1 Development model.....	13
8.2 Project management model.....	14
8.3 Deviation and change management.....	14
8.4 Transferral and approval.....	14
8.5 Warranty management	14
8.6 <Software> configuration and data management.....	15
8.6.1 <Software> configuration management	15
8.6.2 Data management.....	15
8.7 Communications management	15
8.8 Security and confidentiality	16
9 Project closure.....	16
10 Process tailoring in the project.....	16
11 Appendices	Error! Bookmark not defined.

Project Plan template

<organisational unit 1>
<organisational unit 2>
<Author>

<V1.0-1 Draft>
<confidentiality class>
<yyyy-mm-dd>

11.1 Appendix 1: Project schedule (<version>, <yyyy-mm-dd>)	Error! Bookmark not defined.
11.2 Appendix 2: Risk list (<version>, <yyyy-mm-dd>)	Error! Bookmark not defined.
11.3 Appendix 3: Quality plan (<version>, <yyyy-mm-dd>)	Error! Bookmark not defined.
11.4 Appendix 4: Requirements specification (<version>, <yyyy-mm-dd>)	Error! Bookmark not defined.
11.5 Appendix 5: Communication plan (<version>, <yyyy-mm-dd>)	Error! Bookmark not defined.
11.6 Appendix 6: Configuration management plan (<version>, <yyyy-mm-dd>)	Error! Bookmark not defined.
11.7 Appendix 7 (internal): Staffing plan (<version>, <yyyy-mm-dd>)	Error! Bookmark not defined.
11.8 Appendix 8 (internal): Stakeholder list (<version>, <yyyy-mm-dd>)	Error! Bookmark not defined.
11.9 Appendix 9: Information matrix (<version>, <yyyy-mm-dd>)	Error! Bookmark not defined.
11.10 <Name of the appendix> (<version>, <yyyy-mm-dd>)	Error! Bookmark not defined.
12 References	17
13 Change history (Project plan)	17
14 Change history (template – please remove this chapter with the table when taking the template into use)	Error! Bookmark not defined.

Project plan: <Project's name> (<Project ID>)

<The purpose of the project plan is to document the project's commitment.

The project plan is a result of Project planning sub-process in the Initiation sub-process of the preparatory phase. It is the basis for the execution and closure phases of the project. The Project manager prepares it based on the Project directive agreed at DP1. The Internal steering group reviews it at DP2. Before its approval by the Internal steering group at DP3, it is reviewed by the Quality lead. During project execution the project plan is maintained as needed and approved by the Steering group in DP5. The project plan should always reflect the current status and way of working in the project.

The project plan is often an appendix to the agreement with the Customer.

If you need to tailor organisation's standard processes to satisfy your project's needs, e.g. because of Customer reasons, please describe the project-specific procedures in the project plan and its complementary plans. In addition, summarise agreed tailoring in chapter 10.

Note. The project plan is the most important management document of the project. You need to find a balance between a concise, easy-to-read-and-understand and at the same time a descriptive presentation on what the project is all about and how it is carried out. Pay attention to a logical structure (paragraphs within chapters) and avoid long and complex sentences. Concentrate to describe WHO does WHAT and WHEN, and present briefly HOW it is done. Usually this can be accomplished in one or few short paragraphs.

Note. The two upper level headings for chapters in this document are mandatory. You cannot remove them or change their numbering. However, you can add new chapter headings below the existing ones according to your needs. Do not remove the mandatory heading of a chapter even if you have nothing to state under it. Mention "Not applicable" under the section with a short justification why this section is not relevant to your project.. This is a way in which you can state your position on certain issues related to the project.

REMOVE THESE PARAGRAPHS ABOVE FROM YOUR ACTUAL PROJECT PLAN! Remember to update the table of contents on page 2.>

1 Project summary

1.1 Project background

<Give a short summary of the project, its background and characteristics, duration and effort needed.

<organisational unit 1>
<organisational unit 2>
<Author>

<V1.0-1 Draft>
<confidentiality class>
<yyyy-mm-dd>

The project idea should describe the connection between the expected benefits and the project objectives by summarising the purpose of the project and in what sense the project contributes to it.

The benefit is the target state where the project leads to and is achieved in long term, and the objectives are the short term concrete steps to achieve the benefit

Example: "The project contributes to the ...'benefit'... by ...'project objective(s)'..."

"The project leads to x% of cost savings by virtualizing 'a', 'b' and 'c' applications">

1.2 Project priority

<Describe the priority of the project objectives (i.e. "time-boxed", result-oriented or cost-oriented) by a mark (x) in the table. You should select only one option which will then be driving the project management. This priority should be defined in the project directive.>

Priority			
	Result		Schedule (time-boxed)
			Costs

2 Project scope

2.1 Project objective(s)

<Describe the project objective/partial objectives at high level (If necessary, add details regarding the priority of result, time and cost).>

2.2 Scope and deliverables

<Specify as explicitly as possible the scope and the deliverables of the project: what has to be delivered to whom. For the deliverables (e.g. features/use cases/requirements of a package or an increment), describe the procedure, approval criteria and the authority that will approve it.

Note that different software development lifecycle models (e.g. Agile, incremental, waterfall) have different approach in scoping the delivery and binding to the deliverables. If necessary, comment the chosen model's influence on the scope and the deliverables.

List the deliverables in the project's milestones (chapter 3.2).

Refer to appendix 1 if you want to present a more detailed list and description of the deliverables (i.e. packaging details and/or approval procedure/criteria for different users/receivers). >

Project Plan template

<organisational unit 1>
<organisational unit 2>
<Author>

<V1.0-1 Draft>
<confidentiality class>
<yyyy-mm-dd>

Deliverable no	Description of deliverable	Receiver	Approval criteria and procedure
1	<Package/increment X • Feature/Use case/Requirement Y1 • Feature/Use case/Requirement Y2>		
2			

2.3 Exclusions

<Clarify the project objectives by defining what is NOT included in the project's commitment, i.e. what other projects, Customer and/or the line organisation has to be responsible for. However, try to avoid negative expressions.

In other words, describe work that is not included in the project and is outside of the scope.>

2.4 Preconditions and outer dependencies

<Define the prerequisites and/or the assumptions which form the preconditions for the project and the project plan. The prerequisites can be of technical, administrative or resource-oriented nature.

List the external preconditions that must be available at given time in order to be able to start a specific work in the project. This could be results from another project or part of the Customer's commitment e.g. involvement of Customer's experts, deliveries of Customer's/other suppliers' materials or access to key equipment. In the project schedule you can define these as external milestones in order to emphasise their importance for successful implementation of the project tasks.>

<List also the material which the Customer has to deliver and the names of those who will approve these deliveries.>

ID	Description of precondition	Approval criteria	Responsible	Deadline
1				<yyyy-mm-dd>
2				
3				

3 Project schedule

3.1 Project phasing, dependencies and schedule

<Prepare a project schedule (Gantt). It should depict the project phases/iterations/sprints, project's possible subprojects, and the main work packages (increments) and their interdependencies.

Create a work breakdown structure (WBS) by decomposing the project deliverables into work packages. It should also address the identification, planning and monitoring of support activities like project management, quality management, configuration management, project milestone reviews, risk management, subcontractors management etc. Give the start and finish dates for each of them. The project schedule is used for follow-up and reporting the status of the project to the Steering group.

If the project team is distributed, ensure enough lead times for travel due to passports and visa requirements, during the schedule planning. Also note the major festival/vacation times at the utilized delivery centres to minimize risk to delivery schedules.

Present here an overall figure of schedule containing the major phases/iterations/sprints, DP4-DP8 decision points and milestones (deliveries), and refer to the more detailed Gantt presentation in the appendix.>

3.2 Decision points and milestones

<List, name and describe decision points (Steering group meetings) and milestones (technical events, quality gates or other important cornerstones on which the project is dependent). They may be events such as the time the results are ready for a defined level, the time the project gets deliveries from the Customer etc. Also outer dependencies can be set as milestones. Remember add these also in the project schedule (Gantt).>

Milestone	Date (yyyy-mm-dd)	Description of decision point/milestone
DP4	yyyy-mm-dd	Start of project execution
DP5-1	yyyy-mm-dd	Decision about changes, report of project status
DP5-n	yyyy-mm-dd	Decision about changes, report of project status
<ID>	yyyy-mm-dd	<Description>
DP6	yyyy-mm-dd	Approval of the delivery
DP7	yyyy-mm-dd	Approval of transfer of responsibility
DP8	yyyy-mm-dd	Approval of final report, warranty activities and project closure

3.3 Schedule tracking

<Describe briefly the means, frequency and responsibility of tracking the schedule in the project.>

4 Project cost

<List the effort/workload and expenses necessary to carry out the project, preferably split by work packages (or refer to cost information in the agreement) in the table below.

Also consider the cost from the section 5.3 Purchases and subcontracting work.

If the project is to be carried out with distributed teams, consider the travel expenses based on the planned travel requirements (visa, domestic travel, international travel, hotel, per diem etc) while calculating the work package costs.>

The total cost of the project along with the work-package and expense-specific costs are mentioned in the table below:

ID	Work packages/Expense detail	Effort (h)	Cost (EUR)
	TOTAL		

<Describe the estimation methods used in the project for estimating size, effort, cost and resource requirements (e.g. Use Case Points (UCP), Planning Poker). Identify also what kind of historical data is used as a reference data for the estimation process. Tell also how the effort will be re-estimated, monitored and analysed in the project.>

5 Project resources

5.1 Project organisation

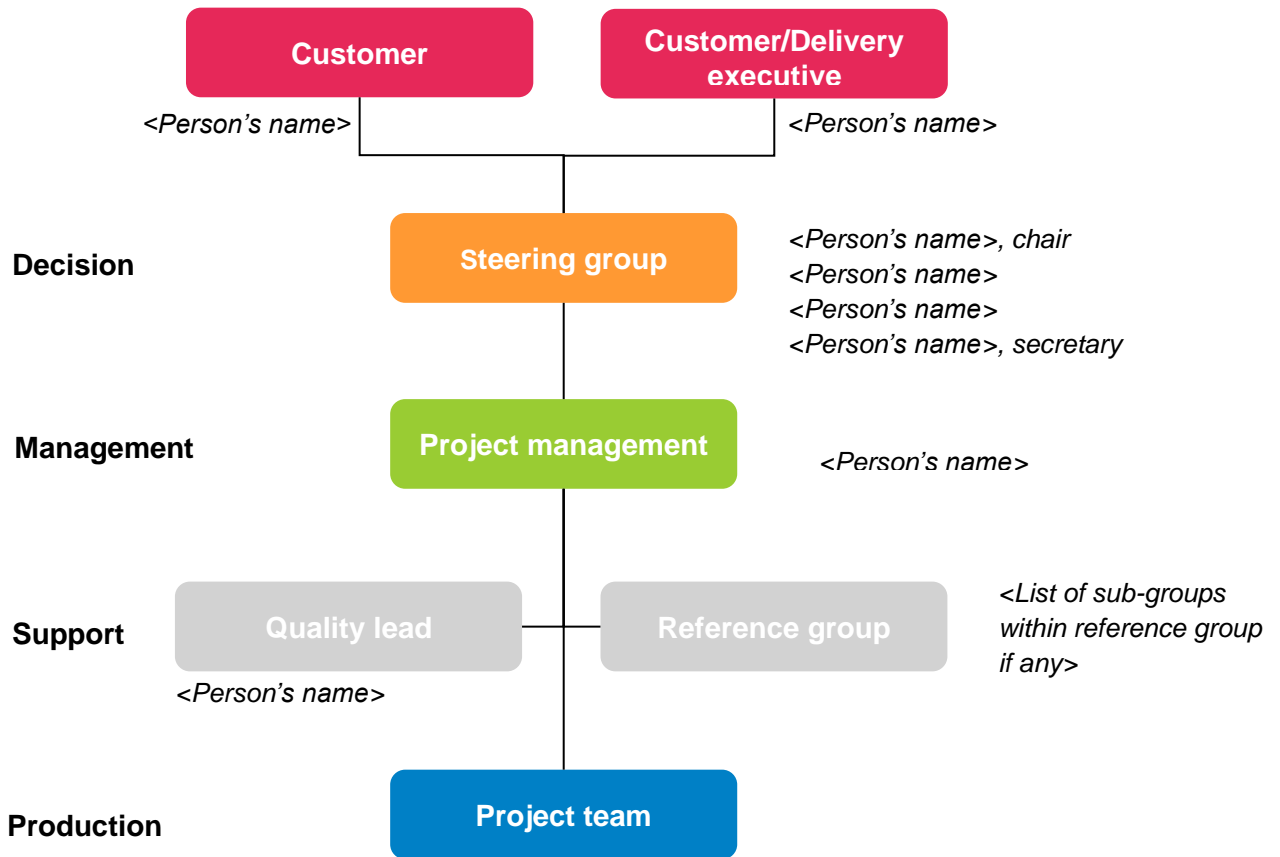
<Use the organisation chart as shown below to describe your project organisation with names related to project management and steering. If the project team and Reference groups have several members – and especially if changes in composition of these groups are possible – enclose the list of members with their contact information as a separate appendix to the plan, instead of having those names in the project plan.

The table – below the organisation chart – should describe the responsibilities and authorities of the project roles in general. Some examples are provided in italics. List the functions and/or people who will provide project support and in what sense the project will be assisted.>

Project Plan template

<organisational unit 1>
<organisational unit 2>
<Author>

<V1.0-1 Draft>
<confidentiality class>
<yyyy-mm-dd>



Role	Key responsibilities and authorities
Project manager	<ul style="list-style-type: none"> Executes the project within approved plans. Makes needed decisions within the limits of approved project plans and TietoEVERY policies. Follows up, steers and prioritizes the team activities within the project Reports project status to the Program manager/Internal steering group and calls for decisions and actions needed to successfully complete the project.
Solution architect	<ul style="list-style-type: none"> Designing and modelling the comprehensive solution architecture from different viewpoints: Business, information, Offerings, systems and services, technical infrastructure Mapping business requirements to solutions/system/technical requirements. Support for identifying needed resources and competences for delivering the solution.
Customer	<ul style="list-style-type: none"> Initiates and finances the project and ensures that the result can be used in its operations. Is a member of the project steering group. Appoints customer side persons as steering group members.

Project Plan template

<organisational unit 1>
<organisational unit 2>
<Author>

<V1.0-1 Draft>
<confidentiality class>
<yyyy-mm-dd>

Role	Key responsibilities and authorities
Customer executive	<ul style="list-style-type: none"> Accountable for sales pipeline, opportunities, bids, contracts and deliveries with the customer
Delivery executive	<ul style="list-style-type: none"> Accountable for the delivery (contract fulfilment) Appoints and supports the project manager by active commitment in the project. Is a member of the project steering group
Program manager	<ul style="list-style-type: none"> Executes the program within approved program plans. Makes needed decisions within the limits of approved program plans and TietoEVRY policies. Follows up, steers and prioritizes the projects and activities within the program. Acts as Internal steering group to its projects. Reports the status of the program to the Steering Group and calls for decisions and actions needed to successfully complete the program.
Steering group	<ul style="list-style-type: none"> Follows up and steers the project in order to ensure that the intended benefits are achieved. Approves project plans (including budget, schedule and scope) and changes to them. Approves the deliverables and releases from the project. Makes the go/no-go decisions at project milestones.
Internal steering group	<ul style="list-style-type: none"> Highest decision-making body of the project from the internal (TietoEVRY) perspective. It makes decisions related to the project (e.g. financial and prioritisation issues) that concern internal issues and/or cannot be done together with the Customer. Is the escalation body for Delivery executive (and/or Program manager) and Project manager/Continuous service manager related to issues not possible to solve within the borders of the delivery.
Quality lead	<ul style="list-style-type: none"> Supports project manager in project quality management (quality planning, quality evaluation and quality improvement) and in process tailoring. Mainly attends to quality assurance (i.e. assuring management that defined standards, practices, procedures and methods of the process are applied). Is a delivery-internal person qualified to lead the quality in a delivery Reports both to the project manager and the relevant P&Q organizations.
Project team	<ul style="list-style-type: none"> Executes delegated tasks available in the detailed project plan Continuously reports spent and forecasted effort. Signals perceived risks and deviations to the project manager. Regularly interacts with other team members to deliver or receive work packages on schedule. Reports to the project manager.
Reference group	<ul style="list-style-type: none"> Evaluates or can recommend a decision for the steering groups whether the project delivery results are suitable for their intended use and maintenance. The members of a reference group can be internal and external, and they usually are key stakeholders for a particular issue.

<Describe how formal decision making or the escalations are done.

Project Plan template

<organisational unit 1>
<organisational unit 2>
<Author>

<V1.0-1 Draft>
<confidentiality class>
<yyyy-mm-dd>

For example: Formal decision making is done through the Steering group.
Steering group makes decisions of changes regarding project's scope, phases, schedule, costs, results and organization.

Project documentation and other deliverables are also approved by the steering group>

5.1.1 Staffing plan

<Project staffing requirements can be maintained in an internal appendix 7 or in the table as below.>

Resources	Estimated requirements	Plan to manage shortfall / constraints if any
Team size at start		
Peak team size		

5.1.2 Training & competency requirements

<List the numbers and types/categories of competences with desired levels necessary for the project. Use preferably the standard competence categories and names within TietoEVERY (see MyData tool). As levels use the ones used within HRM processes (5 levels: Novice – Learner – Professional – Senior Professional – Expert). If such competences are distributed across different geographical regions then preferably indicate their locations. If necessary and possible, divide the competence needs by area of competence and resource owner. An area chart or a skill matrix could be illustrative. Mention any specific methodologies or techniques to be used and in which project phase these would be required.>

ID	Competence category	Competence name	Expected level

5.1.3 Competence development

<Prepare a plan (incl. time-table) for trainings and other competence development activities that the project team may need in order to fill the gaps between required and actual competences and hence to realise the project objective(s). Use outcomes of chapter 5.2 and 5.3 as inputs for this planning. Include these in the project schedule and effort estimates if the competences need to be developed during the project. Remember also describe how the effectiveness of the competence development activities are evaluated. If the competence development is outside the project scope but prerequisite for the success of the project, define activities e.g. as milestones in the project schedule.

Project Plan template

<organisational unit 1>
<organisational unit 2>
<Author>

<V1.0-1 Draft>
<confidentiality class>
<yyyy-mm-dd>

You can enclose the competence development plan as an appendix to this project plan.>

5.2 Work environment

<Describe the work environment for the project. It comprises an infrastructure of facilities, tool and equipment that the project staff need perform their work efficiently. The work environment shall be base on the organisation's work environment standards. The standards may be set also by the Customer. Tools and equipment would include e.g. hardware, software licenses and other tools used in the project, and you can describe them in the table below or refer to the organisation's work environment standards.>

ID	Resource name (hardware/software)	Purpose	Configuration / specification	Required number	Deadline
1					<yyyy-mm-dd>
2					

5.3 Purchases and subcontracting work

<Describe the purchases (e.g. ready-made software, components, licenses and other materials) necessary for the development of the results or that are part of it. If there are several subcontractors, list them in a table. In this table give a short description of the actual subcontractor, expected results and delivery date. Similarly, if there are collaborators, list them in a separate table with a similar description for each of them.>

Purchase	Quantity	Unit price (EUR)	Total price (EUR)	Purpose
<Both name and other identification information, e.g. version>				<Reasons why to purchase>

Subcontractor	Description	Expected results	Delivery date

Collaborator	Description	Expected results	Delivery date

6 Project risks and management

<Describe the strategy, procedures and responsibilities for managing risks. List the risks identified during sales risk analysis and the (pre-) project planning, and measures for mitigation as well as contingency plans already implemented or planned. State also the frequency for tracking the risks. Use the "Risk management tool" and enclose risk list generated from the risk management tool here as an appendix.>

7 Project quality objectives and management

<This chapter is for describing the delivery quality management activities. It is recommended to have a separate quality plan that is subsequently enclosed as an appendix to this plan. However, if no separate quality plan is prepared, still then the content of the quality plan template (TPM00203) should be used as a checklist to create the structure for this chapter i.e. add sub-chapters under this chapter 7; e.g. 7.1 Quality requirements & objectives, 7.2 Quality evaluation, etc.

Start quality planning by listing the quality objectives required by the Customer, Customer executive and/or Customer manager or Program manager and/or Delivery executive, and how their realisation is measured. Describe all the delivery quality management activities (quality planning, pre-requisites for quality management, quality evaluation (quality control & quality assurance) and quality improvement activities planned in the project).

Customer feedback management. While TietoEVRY and the customers are jointly implementing and rolling out a solution or service from TietoEVRY, the customer's thoughts and concerns are varying depending on a phase we are in within the delivery. Delivery Experience survey is performed with planned interval towards customer contacts, related to the delivery. The survey results are reported and analysed with planned frequency. The possible improvement actions are initiated and managed till closure.>

8 Project development and management processes

8.1 Development model

<State which of the organisation's standard software development processes and lifecycle models are the basis for the project's defined development model (TBN! This is not about project management model). Describe the model (e.g. RUP, agile, iterative, RAD, spiral, waterfall or maintenance) by defining how different development related processes (e.g. requirements engineering, architecture & design, detailed design & implementation, integration & build, release & deployment) will be performed (if there is a separate quality plan, the testing is described there or in a separate test plan). Describe what kind of frameworks, models, methods, modules, etc. are used. Alternatively, refer to an existing model (e.g. Agile SWD) and list deviations/exceptions from it.>

8.2 Project management model

<Describe what project management process(es) and model is followed in the project. By default, TietoEVERY's Project management process TPM is followed.>

8.3 Deviation and change management

<Describe the procedure and responsibilities for managing deviations and changes. Notice the definitions of deviation and change:

- A deviation occurs when there is non-conformity with specified requirements (or other agreed basis). This means that the project is "at fault". Either it has to be corrected or the basis has to be adjusted.
- A change is an alteration of an agreed specification or other basis (project plan, agreement, requirement, development/project environment etc.). It means that the project (if the change is implemented) has to do other than what was agreed (doing more or even less usually both demands effort for re-planning).
- Small technical errors and corrections are handled within activity control as part of the development process itself.>

8.4 Transferral and approval

< Describe to whom the responsibilities will be transferred after the end of development activities. Describe the content of the transferrals that the project will make to the maintenance organisation over time. Specify who the recipient is, i.e. who will approve the transferral of responsibility for the result. "Transferral procedure and approval" describes how the transferral and approval will be carried out and the criteria for approval. Appendices can be used for complex deliveries, in order to clarify the details regarding packaging, transferral procedure and approval criteria (e.g. requirement and solutions descriptions). >

Content	Recipient	Delivery procedure and approval	Date

8.5 Warranty management

<Describe the length of the warranty period. How the warranty period will be managed. What will the escalation mechanism during the warranty period. Ensure that the resource plans also include the warranty activities>

8.6 <Software> configuration and data management

8.6.1 <Software> configuration management

<If your project is a software project, name this chapter as “Software configuration management”. If it is a non-software project, name it as “Configuration management”. Describe in detail all the configuration management (CM) related issues. The CM plan can also be a separate document and an appendix to this project plan. In Repeatable Solution Business, the product-level CM plan can be referred to and only possible changes to that are specified here. It is recommended that there is a separate Configuration manager in a project and then this plan can be on his responsibility.>

8.6.2 Data management

<Describe also how the management of the project data is performed. Project data includes documentation resulting from project management activities but also other project-related data that is stored in other form than a document (e.g. measurement data in TERP or TietoEVERYFacts, project-specific lists in Teamer). Describe how the project data is identified, collected, distributed and archived. Remember to describe the version control of documents, incl. approval.>

8.7 Communications management

<Describe procedures and responsibilities for managing stakeholders. A project can have different kind of stakeholders. Project-internal stakeholders are the roles defined for the project organisation (see chapter 5.1). Project-external stakeholders are those parties who need to be involved and managed during the progress. List the stakeholders identified during project planning using “Stakeholder list” template and referring to that as an appendix) and actions already implemented or planned.

Describe the information and communication needs of each stakeholder. Describe also how and when project information/documents (oral or written) are distributed to different target groups. The easiest way to do this is by using the “Communication plan” template and refer to it as an appendix. List the tools used for communication. Describe how the performance reporting is managed in the project. List the regular meetings (Steering group, project team, Reference group, etc.) necessary during the project.

Explain the rules related to confidentiality and security of project data that may apply for access to work premises, information about the project and the results produced.

It is recommended to maintain all communication requirements with internal and external stakeholders in the communication plan and enclose it as a separate appendix to this plan. However, if a separate communication plan is not created then the table below can be used>

Project Plan template

<organisational unit 1>
<organisational unit 2>
<Author>

<V1.0-1 Draft>
<confidentiality class>
<yyyy-mm-dd>

Deliverable	Description/purpose	Responsibility	Distribution	Channel	Timing
<The document or file>	<What information the deliverable carries>	<Who is responsible to share the info>	<To whom this info is shared>	<Way of sharing information>	<When is this information shared>

8.8 Security and confidentiality

< Explain the rules that apply regarding access to work premises, access to the project information and the results produced. Describe also the security rules for how working material, etc. is to be handled. >

9 Project closure

<Describe the procedure to transfer responsibility of the result to the maintenance organisation. Name the approving recipient.

Describe the tasks after final delivery (DP6) and transfer of responsibility (DP7) for closing the project (e.g. feedback surveys, evaluation of the project, return of resources, writing of final report, sharing the final report within own organisation).>

10 Process tailoring in the project

<Process tailoring can be done in order to suite the particular project and the environment at hand as good as possible. Describe main reasons for tailoring from the TietoEVERY Process System standard process assets – such as project size, distribution, usage of tools, usage of process assets of Customer or sub-contractor, contract type, risk exposure, sub-contracting etc. When replacing a mandatory TietoEVERY Process System element by one as requested by the Customer, a thorough comparison must be made in order to address any gaps that might arise, and thus not increase the risk level. List all decided process tailoring with considerations and reasons in the table below, as agreed with the Quality lead and finally approved by Steering group.

If TietoEVERY's Process system and Project management process (TPM) are used without any external or internal tailoring needs, the table below can be removed when stated in the text that these are applied as such.>

TietoEVERY Process System process asset	Tailoring description	Justification

Project Plan template

<organisational unit 1>
<organisational unit 2>
<Author>

<V1.0-1 Draft>
<confidentiality class>
<yyyy-mm-dd>

11 References

Ref.	Document name and designation	Version identification
1		
2		

12 Change history (Project plan)

Version	Date	Author	Reviewed by	Approved by	Change history
<V1.0-1 D>	<yyyy-mm-dd>	<name>	<name>	<name>	<description of changes>