

Project Management *Plan*

The integrating plan that says how the project will be run, monitored, controlled, and closed, and where every supporting plan and baseline lives.

USE WHEN	OWNER	APPROACH	TIER
After the charter is signed, before baselines are approved. Update at each gate.	Project manager prepares · sponsor approves	ALL	Essential

HOW TO USE THIS TEMPLATE

1. Complete the approach selection and tailoring worksheet (T08) first. Sections 2 and 3 summarize it.
2. Fill sections 1 to 4 with the core team. Point to source documents rather than copying them.
3. In section 5, decide for each plan: full template, short form in Appendix A, or not needed.
4. Get approval before baselining. After that, change this plan only through change control and log each version in section 9.
5. Delete guidance text (italic) before sharing.

Project name	
Project ID / client	
Prepared by	
Version · date	
Approved by	

1 Project summary

Summarize the project in a few lines and point to the charter (T09). Don't rewrite it. Test: a new team member can explain the project in one minute after reading this section.

PURPOSE, OBJECTIVES, AND SCOPE (IN AND OUT)

Key dates (start · go-live · close)	
Total authorized budget	
Charter reference (version · date)	

2 Life cycle and development approach

The life cycle is the set of phases the project moves through from start to close. The development approach is how each piece of work is produced: predictive (planned up front) or adaptive (built in short iterations and refined). Hybrid uses both. List each workstream or phase and how it runs. Test: each lead can say when their work is reviewed and what it depends on.

☐ Predictive ☐ Hybrid ☐ Adaptive

WORKSTREAM OR PHASE	APPROACH	CADENCE OR PHASES	GATES OR REVIEWS	DEPENDS ON OR FEEDS

INTEGRATION POINTS (HYBRID)

3 Tailoring summary

Tailoring means adjusting standard practices to fit this project's size, risk, and approach. List only real departures from your organization's standard. Full reasoning sits in the tailoring worksheet (T08). Test: each choice has a reason a sponsor would accept.

PRACTICE	ORGANIZATION STANDARD	TAILORED CHOICE	REASON

4 Baselines summary

A baseline is the approved version of scope, schedule, or cost that progress is measured against. It changes only through change control. Test: each baseline names the document it lives in and the variance that triggers action.

BASELINE	WHAT IT INCLUDES	SOURCE DOCUMENT (TEMPLATE)	APPROVED BY · DATE	VARIANCE THAT TRIGGERS ACTION
Scope				
Schedule				
Cost				

Reserves and performance measurement baseline

Contingency reserve is budget set aside for identified risks; it sits inside the cost baseline. Management reserve is budget for unforeseen work within scope; it sits outside the cost baseline and is released only through an approved change request (T65). The performance measurement baseline (PMB) is the combined scope, schedule, and cost baselines that earned value (a method that compares work done with time and money spent) is measured against; it excludes management reserve. Test: the amounts add up to the total authorized budget, and each reserve names who may release it.

Contingency reserve · amount (inside the cost baseline)	
Contingency reserve · controlled by and limits	
Management reserve · amount (outside the cost baseline)	
Management reserve · released by and how	
Total authorized budget (cost baseline + management reserve)	
Performance measurement baseline · what it covers	

EARNED VALUE USED ☐ Yes, whole project ☐ Some workstreams ☐ No

WHERE EARNED VALUE APPLIES AND HOW OFTEN IT IS REPORTED

Adaptive scope ADAPTIVE / HYBRID ONLY

Adaptive work is not held to a fixed scope baseline. The product backlog (T25) and release plan (T26) are reprioritized each iteration within agreed dates and budget. Say how adaptive scope connects to the baselines above and who decides what moves in or out.

5 Subsidiary plans index

A subsidiary plan covers one area of management, such as risk or communications. Not every project needs every plan. Tick one box per row: a full template, a short form in Appendix A, or not needed. Test: every area that could hurt the project if handled ad hoc has a home.

PLAN	TEMPLATE	FULL	SHORT FORM	NOT NEEDED	LOCATION	STATUS	APPROVED
Benefits management	T07	☐	☐	☐			
Scope management	T17	☐	☐	☐			
Requirements management	T18	☐	☐	☐			
Schedule management	T27	☐	☐	☐			
Financial (cost) management	T30	☐	☐	☐			
Quality management	T32	☐	☐	☐			
Resource management	T33	☐	☐	☐			
Stakeholder engagement	T38	☐	☐	☐			
Communications management	T40 · T41	☐	☐	☐			
Risk management	T42	☐	☐	☐			
Procurement management	T44	☐	☐	☐			
Change management (project change control)	T48	☐	☐	☐			
Configuration management	T49	☐	☐	☐			
Transition and rollout	T52	☐	☐	☐			
		☐	☐	☐			

6 Management reviews and gates

A gate is a formal decision point where the sponsor or steering committee decides whether the project continues, changes course, or stops. Reviews include steering meetings and iteration reviews. Test: every gate has a named decision-maker and agreed inputs. Use the phase-gate checklist (T69) and governance model (T12).

REVIEW OR GATE	TIMING OR FREQUENCY	DECIDED OR CHAIRED BY	INPUTS	DECISION OR OUTPUT

7 Configuration and change control summary

Change control is how proposed changes to the baselines are assessed and approved. Configuration management is how versions of documents and deliverables are controlled. Summarize the rules here; detail goes in the change management plan (T48) and configuration management plan (T49). Test: a team member knows where to send a change and who decides it.

What counts as a change	
Approval levels and thresholds	
Change control board (members)	
Emergency changes	
Adaptive changes (backlog)	
Request form · log	
Version control and storage	

8 Approval

Approval confirms the plan and its baselines are agreed and that progress will be measured against them.

Sponsor (name, title)	
Other approvers, if any	

Sponsor signature · date	Project manager signature · date	Steering committee chair (optional) · date
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9 Revision history

Log every approved change to this plan. Save each change as a new version; never overwrite an approved one.

VERSION	DATE	AUTHOR	SUMMARY OF CHANGE

A Appendix A · Short-form plans

For small or low-risk projects, a few lines here can replace a full plan. Fill only the boxes you ticked "short form" in section 5. Test: if a box needs more than half a page, use the full template instead.

BENEFITS (T07)

Each benefit, its measure, owner, and when it is measured.

SCOPE AND REQUIREMENTS (T17 · T18)

How scope is defined, how requirements are tracked, who accepts deliverables.

SCHEDULE (T27)

Scheduling method, tool, update cadence, and when a slip is escalated.

COST (T30)

How costs are tracked, reserve rules, and who approves spending.

QUALITY (T32)

Standards that apply, how deliverables are checked, and the Definition of Done.

RESOURCES (T33)

Who is on the team, their allocation, and how people join and leave.

STAKEHOLDERS AND COMMUNICATIONS (T38 · T40)

Key audiences, what they receive, and how often. Attach the communications matrix (T41).

RISK (T42)

How often the risk register (T43) is reviewed, who owns it, and what gets escalated.

PROCUREMENT (T44)

What is bought, the contract type, and who manages the vendor.

TRANSITION (T52)

Who receives the result, how handover works, and support after go-live.

COMPLETED EXAMPLE · ILLUSTRATIVE

Client Onboarding Portal · Northfield Creative Group (fictional marketing and design agency)

Abridged. All names, figures, and dates are illustrative.

1 · Summary. Online client onboarding portal to cut onboarding from 5 to 2 business days. January 11 to June 25, 2027; go-live June 1. \$200,000 authorized. Charter v1.0, signed January 15, 2027.

2 · Life cycle (hybrid)

WORKSTREAM	APPROACH	CADENCE	GATES OR REVIEWS	DEPENDS ON OR FEEDS
A. Contracts, privacy, data migration	Predictive	Phases with gates	Requirements baseline; security review Apr 9	Privacy rules feed B's acceptance criteria
B. Portal interface	Adaptive	Two-week sprints	Sprint reviews with coordinators	Needs A's integration specs; feeds C's training
C. Training and adoption	Predictive	Planned back from go-live	Go/no-go before Jun 1	Uses B's release for hands-on sessions

4 · Baselines

Scope: scope statement and WBS for A and C; portal backlog for B. Schedule: milestone list, late tolerance 5 working days. Cost: \$185,000 cost baseline.

4 · Reserves and PMB

Contingency \$12,000, inside the cost baseline; PM releases up to \$5,000 per item, larger amounts go to the sponsor. Management reserve \$15,000, outside the baseline, released only by Dana Whitfield through a change request (T65). Total authorized \$200,000. PMB covers workstreams A and C; earned value reported monthly to the steering committee for A and C, while B is tracked by release burnup.

5 · Plans (excerpt)

Full: risk (T42 with register T43), procurement (T44, Clearpath fixed-price), benefits (T07, owner Marcus Reyes), change (T48). Short form: communications (with matrix T41), stakeholders (with register T11).

6 · Gates and reviews

Requirements baseline gate (sponsor) · security review gate, Elena Torres recommends and steering committee decides · go/no-go before June 1 (steering committee) · monthly steering committee, pre-read 2 business days ahead.

7 · Change control

Scope changes and management reserve go to Dana Whitfield, CEO. Backlog order within the release is Marcus Reyes's call.

9 · Revisions

v1.0 Jan 29, 2027 · Amy Price · approved by Dana Whitfield. v1.1 Feb 17, 2027 · baselines updated after requirements were baselined Feb 9 and the vendor contract was signed Feb 16.