[Project]

[Stage]

[Team]

Plan

How and when objectives will be achieved.

[Ref filename & version]

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# Plan description

# Plan prerequisites

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# Tolerances

# Product descriptions

# Schedule

# Guidance on how to complete

***(Note: following completion of the Plan the pages beyond this point can be deleted)***

## Purpose

A plan provides a statement of how and when objectives are to be achieved, by showing the major products, activities and resources required for the scope of the plan. In PRINCE2, there are three levels of plan: project, stage and team. Team plans are optional and may not need to follow the same composition as a project plan or stage plan.

An exception plan is created at the same level as the plan that it is replacing.

A project plan provides the business case with planned costs, and it identifies the management stages and other major control points. It is used by the project board as a baseline against which to monitor project progress.

Stage plans cover the products, resources, activities and controls specific to the management stage and are used as a baseline against which to monitor management stage progress.

Team plans (if used) could comprise just a schedule appended to the work package(s) assigned to the team manager.

A plan should cover not just the activities to create products but also the activities to manage product creation, including activities for assurance, quality management, risk management, change control, communication and any other project controls required.

## Composition

A plan includes the following:

* **Plan description** A brief description of what the plan encompasses (i.e. project, stage, team, exception) and the planning approach
* **Plan prerequisites** Any fundamental aspects that must be in place, and remain in place, for the plan to succeed
* **External dependencies** Dependencies that may influence the plan
* **Planning assumptions** Assumptions upon which the plan is based
* **Delivery approach(es)** A description of the approaches to be used
* **Lessons incorporated** Details of relevant lessons from previous similar projects, which have been reviewed and accommodated within this plan
* **Monitoring and control** Details of how the plan will be monitored and controlled
* **Budgets** Time and cost budgets, including provisions for risks and changes
* **Tolerances** Time, cost and scope tolerances for the level of plan (which may also include more specific management-stage- or team-level risk tolerances)
* **Product descriptions** (see section A.17) Descriptions of the products within the scope of the plan (for the project plan this will include the project’s products; for the stage plan this will be the management stage products; and for a team plan this should be a reference to the work package assigned). Quality tolerances will be defined in each product description
* **Schedule** This may include graphical representations as:
  + a Gantt or bar chart
  + a product breakdown structure (see Appendix D for examples)
  + a product flow diagram (see Appendix D for an example)
  + an activity network
  + a table of resource requirements, by resource type (e.g. four engineers, one test manager, one business analyst)
  + a table of requested/assigned specific resources, by name (e.g. Nikki, Jay, Francesca).

## Derivation

A plan is derived from the following:

* project brief
* quality management approach (for quality management activities to be included in the plan)
* risk management approach (for risk management activities to be included in the plan)
* communication management approach (for communication management activities to be included in the plan)
* change control approach
* resource availability
* registers and logs.

## Format and presentation

A plan can take a number of formats, including:

* a stand-alone document or a section of the PID
* a document, spreadsheet, presentation slides or mind map
* an entry in a project management tool.

The schedule may be in the form of a product checklist (which is a list of the products to be delivered within the scope of the plan, together with key status dates such as draft ready, quality inspected, approved, etc.) or the output from a project planning tool. Table A.1 provides an example of a product checklist.

Table A.1 Example of a product checklist

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Product identifier | Product title | Product description approved | | Draft ready | | Final quality check completed | | Approved | | Handed over (if applicable) | |
| Plan | Actual | Plan | Actual | Plan | Actual | Plan | Actual | Plan | Actual |
|  |  |  |  |  |  |  |  |  |  |  |  |
| 121 | Test Plan | 02 Jan | 02 Jan | 07 Jan | 07 Jan | 14 Feb | 21 Feb | 21 Feb | 28 Feb | N/A | N/A |
| 122 | Water pump | 02 Jan | 02 Jan | 13 Mar | 13 Mar | 14 Jun |  | 30 Jun |  | 14 Jul |  |
|  |  |  |  |  |  |  |  |  |  |  |  |

## Quality criteria

The following quality criteria apply to a plan:

* The plan is achievable.
* Estimates are based on consultation with those responsible for the people who will undertake the work, and/ or historical data.
* Team managers agree that their part of the plan is achievable.
* It is planned to an appropriate level of detail (not too much, not too little).
* The plan conforms to required corporate, programme management or customer standards.
* The plan incorporates lessons from previous projects.
* The plan incorporates any legal requirements.
* The plan covers management and control activities (such as quality) as well as the activities to create the products in scope.
* The plan supports the quality management approach, change control approach, risk management approach, communication management approach and project approach.
* The plan supports the management controls defined in the PID.