**Attachment: Project Plan Templates**

# The **Project Plan** initially takes the form of a preliminary high-level plan that lays out a broad timeline across the five phases of the project lifecycle. This preliminary plan is viewed as a “swag” and will be adjusted and detailed during later project phases. As the project progresses, the project plan’s “drill downs” for each of the five project phases can be created. The Project Plan is continually refined with adjustments made to the start/end dates for each project lifecycle phase and activities within each phase.

Prior to commencement of the Project Planning Phase, the project plan can be updated with a detailed “explosion” (drill down) of planning phase activities.

Prior to commencement of the Project Funding Phase, the project plan can be updated to include target dates for expected client acceptance and funds provisioning.

Prior to commencement of the Project Executing Phase, the project plan can be updated to include a detailed “explosion” (drill-down) of the executing phase (not to be confused with Project Execution Plan).

ID Task Name Duration Start Finish

1. Initiation Phase 6 days? Tue 10/6/09 Tue

10/13/09

4, '09 Oct 11, '09 Oct 18, '09 Oct 25, '09 Nov 1, '09 Nov 8, '09

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1. Planning Phase

6 days? Tue 10/13/09

Tue 10/20/09

1. Funding Phase 6 days? Tue 10/20/09

Tue 10/27/09

1. Executing Phase

6 days? Tue 10/27/09

Tue 11/3/09

5 Closing Phase 6 days? Tue 11/3/09 Tue

11/10/09

Project: High Level1 - Page 2 Date: Thu 8/2/18

Task Split Milestone Summary

Project Summary External Tasks



External Milestone Inactive Task

Inactive Milestone  Inactive Summary



Manual Task Duration-only



Manual Summary Rollup Manual Summary

Start-only Finish-only Progress



Deadline 

ID Task Name Duration Start Finish

## Initiation Phase 6 days? Tue 10/6/09 Tue 10/13/09

1. Client request submitted 1 day? Tue 10/6/09 Tue 10/6/09
2. Project#, project mgr assigned 2 days? Tue 10/6/09 Wed 10/7/09
3. Intial Assessment/preplanning with client 2 days? Thu 10/8/09 Fri 10/9/09
4. Preliminary work 2 days?Mon 10/12/09 Tue 10/13/09

## Planning Phase 10 days?Tue 10/13/09 Mon 10/26/09

1. Detail Assessment and Requirements Definition Wit 2 days? Tue 10/13/09 Wed 10/14/09
2. Technical Design 3 days? Thu 10/15/09 Mon 10/19/09
3. Budget Development 2 days?Mon 10/19/09 Tue 10/20/09
4. Proposal Development and Internal Review 3 days?Wed 10/21/09 Fri 10/23/09
5. Proposal review with client 1 day?Mon 10/26/09 Mon 10/26/09

## Funding Phase 7 days?Tue 10/27/09 Wed 11/4/09

1. Proposal Acceptance (Client) 2 days? Tue 10/27/09 Wed 10/28/09
2. Preliminary Work 4 days? Thu 10/29/09 Tue 11/3/09
3. Client Funds Received 1 day? Wed 11/4/09 Wed 11/4/09

## Executing Phase 15 days? Thu 11/5/09 Wed 11/25/09

1. Develop Intergrated Execution Plan 3 days? Thu 11/5/09 Mon 11/9/09
2. PO's Issued 4 days? Tue 11/10/09 Fri 11/13/09
3. Execute Detailed Plan 5 days?Mon 11/16/09 Fri 11/20/09
4. Change Order Request 9 days? Fri 11/13/09 Wed 11/25/09

## Closing Phase 4 days?Thu 11/26/09 Tue 12/1/09

1. Verify Project Completion 1 day? Thu 11/26/09 Thu 11/26/09
2. Update Documentation and Archive 1 day? Fri 11/27/09 Fri 11/27/09
3. Financial Closeout 1 day?Mon 11/30/09 Mon 11/30/09
4. Post-Implementation Review 1 day? Tue 12/1/09 Tue 12/1/09

, '09 Oct 11, '09 Oct 18, '09

M T W T F S S M T W T F S S M T W T F



Project: Detailed1 - Pages 3 and 4 Date: Thu 8/2/18

Task Split Milestone Summary

Project Summary External Tasks



External Milestone Inactive Task

Inactive Milestone  Inactive Summary



Manual Task Duration-only



Manual Summary Rollup Manual Summary

Start-only Finish-only Progress



Deadline 

Oct 25, '09 Nov 1, '09 Nov 8, '09 Nov 15, '09 Nov 22, '09 Nov 29, '09

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## 11/4



Project: Detailed1 - Pages 3 and 4 Date: Thu 8/2/18

Task Split Milestone Summary

Project Summary External Tasks



External Milestone Inactive Task

Inactive Milestone  Inactive Summary



Manual Task Duration-only



Manual Summary Rollup Manual Summary

Start-only Finish-only Progress



Deadline 

ID Task Name Duration Start Finish

## Initiation Phase 6 days? Tue 10/6/09 Tue 10/13/09

1. Client request submitted 1 day? Tue 10/6/09 Tue 10/6/09
2. Project#, project mgr assigned 2 days? Tue 10/6/09 Wed 10/7/09
3. Intial Assessment/preplanning with client 2 days? Thu 10/8/09 Fri 10/9/09

Oct 4, '09 Oct 11, '09

S M T W T F S S M T W

1. Preliminary work 2 days? Mon 10/12/09

Tue 10/13/09



Project: Initiation phase Date: Thu 8/2/18

Task Split Milestone Summary

Project Summary External Tasks



External Milestone Inactive Task

Inactive Milestone  Inactive Summary



Manual Task Duration-only



Manual Summary Rollup Manual Summary

Start-only Finish-only Progress



Deadline 

ID Task Name Duration Start Finish

## Planning Phase 10 days? Tue Mon 10/26/09 10/13/09

4, '09 Oct 11, '09 Oct 18, '09 Oct 25, '09 M T W T F S S M T W T F S S M T W T F S S M T

1. Detail Assessment and Requirements Definition With Client
2. days? Tue Wed 10/14/09 10/13/09
3. Technical Design 3 days? Thu Mon 10/19/09 10/15/09
4. Budget Development 2 days? Mon 10/19/09

Tue 10/20/09

1. Proposal Development and Internal Review 3 days? Wed

10/21/09

Fri 10/23/09

1. Proposal review with client 1 day? Mon Mon 10/26/09 10/26/09



Project: Planning phase1 - Page 6 Date: Thu 8/2/18

Task Split Milestone Summary

Project Summary External Tasks



External Milestone Inactive Task

Inactive Milestone  Inactive Summary



Manual Task Duration-only



Manual Summary Rollup Manual Summary

Start-only Finish-only Progress



Deadline 

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| ID | Task Name | | Duration | Start | Finish | 4, '09 | | | | | | Oct | 11, '09 | | | | | | Oct | 18, '09 | | | | | | Oct | 25, '09 | | | | | | Nov 1, '09 | | | | | |
| M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F |
| 1 | **Funding Phase** | | **7 days?** | **Tue 10/27/09** | **Wed 11/4/09** |  | | | | |  |  |  | | | | |  |  |  | | | | |  |  |  | | |  | |  |  |  | | **11/4** | | |
| 2 | Proposal Acceptance (Client) | | 2 days? | Tue 10/27/09 | Wed 10/28/09 |
| 3 | Preliminary Work | | 4 days? | Thu 10/29/09 | Tue 11/3/09 |
|  | |  |  |  | |
| 4 | Client Funds Received | | 1 day? | Wed 11/4/09 | Wed 11/4/09 |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | |  | Task | |  | External Milestone | | | | | | | |  | | | |  |  | Manual Summary Rollup | | | | | | | | | |  | |  |  |  | |  | | |
|  | |  | Split | |  | Inactive Task | | | | | | | |  | | | |  |  | Manual Summary | | | | | | | | | |  | |  |  |  | |  | | |
| Project: Funding phase1 - Page 7 | |  | Milestone | |  | Inactive Milestone | | | | | | | |  | | | |  |  | Start-only | | | | | | | | | |  | |  |  |  | |  | | |
| Date: Thu 8/2/18 | |  | Summary | |  | Inactive Summary | | | | | | | |  | | | |  |  | Finish-only | | | | | | | | | |  | |  |  |  | |  | | |
|  | |  | Project Summary | |  | Manual Task | | | | | | | |  | | | |  |  | Progress | | | | | | | | | |  | |  |  |  | |  | | |
|  | |  | External Tasks | |  | Duration-only | | | | | | | |  | | | |  |  | Deadline | | | | | | | | | |  | |  |  |  | |  | | |
| Page 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |





ID Task Name Duration Start Finish

## Executing Phase 12 days? Mon 10/12/09 Tue 10/27/09

Oct 11, '09 Oct 18, '09 Oct 25, '09

S S M T W T F S S M T W T F S S M T W

1. Develop Intergrated Execution Plan

3 days? Mon 10/12/09 Wed 10/14/09

1. PO's Issued 3 days? Thu 10/15/09 Mon 10/19/09
2. Execute Detailed Plan 5 days? Tue 10/20/09 Mon 10/26/09
3. Change Order Request 9 days? Thu 10/15/09 Tue 10/27/09



Project: Execution phase1 - Page 8 Date: Thu 8/2/18

Task Split Milestone Summary

Project Summary External Tasks



External Milestone Inactive Task

Inactive Milestone  Inactive Summary



Manual Task Duration-only



Manual Summary Rollup Manual Summary

Start-only Finish-only Progress



Deadline 

ID Task Name Duration Start Finish Owner

## Closing Phase 5 days? Thu 10/15/09 Wed 10/21/09 PMO

1. Verify Project Completion 1 day? Thu 10/15/09 Thu 10/15/09 PMO
2. Update Documentation and Archive 1 day? Mon 10/19/09 Mon 10/19/09 PMO
3. Financial Closeout 1 day? Tue 10/20/09 Tue 10/20/09 PMO
4. Post-Implementation Review 1 day? Wed 10/21/09 Wed 10/21/09 PMO

Oct 18, '09

T W T F S S M T W T



Project: Closing1 Phase - Page 9 Date: Thu 8/2/18

Task Split Milestone Summary

Project Summary External Tasks



External Milestone Inactive Task

Inactive Milestone  Inactive Summary



Manual Task Duration-only



Manual Summary Rollup Manual Summary

Start-only Finish-only Progress



Deadline 