



# CDC UNIFIED PROCESS PRACTICES GUIDE



## PROJECT MANAGEMENT PLAN

### Document Purpose

The purpose of this document is to provide guidance on the practice of developing a **Project Management Plan** and to describe the practice overview, requirements, best practices, activities, and key terms related to these requirements. In addition, templates relevant to this practice are provided at the end of this guide.

### Practice Overview

Project Management Institute (PMI) Project Management Body of Knowledge (PMBOK) defines a Project Management Plan (PMP) as a formal approved document that defines the overall plan for how the project will be executed, monitored and controlled.

The PMP may be a single detailed document or composed of one or more subsidiary planning documents. These additional planning documents provide guidance and direction for specific management, planning, and control activities such as schedule, cost, risk, staffing, change control, communication, quality, procurement, deployment, etc. Each of the subsidiary planning documents should be detailed to the extent required by the specific project.

A PMP is essential for defining how project integration management will be executed when situations arise where individual processes interact. For example, estimating cost involves not only the cost management process but also integration of planning, time, risk, scope etc.

Project Management Institute (PMI) Project Management Body of Knowledge (PMBOK) defines Project Integration Management as the processes and activities needed to identify, define, combine, unify, and coordinate the various processes and project management activities.

In context of project management, integration includes characteristics of unification and consolidation actions necessary for project completion. Integration management also involves making trade-offs among competing objectives and alternatives. Integration in the context of managing a project is making choices about where to concentrate resources and effort on any given day, anticipating potential issues, dealing with these issues before they become critical, and coordinating work. A properly developed PMP outlines how these activities will be conducted taking into consideration any effect they may have on each other and other management processes and/or activities. As the project environment changes updates in the form of change requests should reflect any changes to the PMP and/or its subsidiary plans.

Benefits of creating a PMP include:

- Clearly define roles, responsibilities, processes, and activities
- Increase probability that projects will complete on-time, within budget, and with high degree of quality
- Ensuring understanding of what was agreed upon
- Helping project teams identify and plan for how project activities will be managed (scope, cost/budget, quality, etc.)
- Serving as a project management reference guide

### Developing the Project Management Plan

The process of developing a PMP is primarily concerned with the actions necessary to define, integrate, and coordinate all subsidiary planning documents into a single PMP. The PMP is usually drafted by the Project Manager in collaboration with the project team.

A good PMP is not necessarily lengthy. A PMP can be very short and still have great value. The content of the PMP will vary depending upon the complexity of the project. The size of and time invested to develop a PMP should be balanced with the size and complexity of the project. Large, more complex projects justify a significant effort in developing a comprehensive PMP and may even justify the creation



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of separate subsidiary management plans for some sections of the PMP. If this were the case, the subsidiary plan would be referenced in the appropriate section of the PMP.

The PMP is the main planning document for a project and describes how major aspects of the project will be managed. The PMP is a living document that should be updated continually throughout the project.

Either directly or by reference to other documents, the PMP should address the following:

- **Project and Product Overview** – Describe how areas of the project will be managed. This section should be tailored to fit the particular needs of any NC. This section should provide enough information that an executive reading only this portion of the PMP would have a high-level understanding of the project. Typically, this description should answer who, what, when and where in a concise manner. It should also state the estimated project duration and budget.
- **Project Charter** – Provide a summary of the approved project charter. Provide a reference to the approved Project Charter. Elaborate on any sections within the Project Charter that need further detail contained within the PMP.
- **Scope Management** – Describe how the project scope will be defined, developed, and verified and how the work breakdown structure will be created and defined, and provides guidance on how the project scope will be managed and controlled by the project management team.
  - **Work Breakdown Structure** – Insert the project's work breakdown structure or provide a reference to where it is stored.
  - **Deployment Plan** – Describe the approach to be used to deploy the project's product or service.
  - **Change Control Management** – Describe the Change Control Process, by which change requests will be identified, tracked, approved and prioritized. Include information about how change requests will be initiated, logged and tracked, analyzed and estimated, approved, integrated into other areas of the PMP, and communicated to project stakeholders.
  - **Training Plan** – Describe the strategy for implementing training for the project's product. Describe the process, objectives, milestones, requirements, materials, and issues involved in developing and deploying user, network, data center, system administrator and/or support team/help desk training. Include information such as developing, approving distributing training materials, determining the type of audiences that will receive training, and training facilities.
- **Schedule/Time Management** – Describe who will be responsible for and how the schedule will be managed. How frequently will it be updated, how will variances be addressed, and what will be considered an unacceptable variance. Schedule management is the process of ensuring that the project schedule is baselined, maintained, and managed accordingly.
  - **Milestones** – Describe the milestones of the project. Milestones are significant accomplishments that typically are the culmination of a series of tasks.
  - **Project Schedule** – Insert the project's schedule or provide a reference to where it is stored. A project schedule is the agreed upon set of tasks and due dates used to guide and monitor the project to completion.
    - **Dependencies** – Summarize both internal and external schedule/project dependencies.
- **Cost/Budget Management** – Describe how cost and cost variances will be managed. This section summarizes the cost and effort estimates of the project, documents any known factors that may increase those estimates, and defines how they will be measured throughout the project's life. Cost management is the process of ensuring that a project is completed within the approved budget and that cost variances are proactively managed throughout the project.
- **Quality Management** – Describe the approach that will be followed to manage and ensure product quality during the project. Describe what metrics will be used to measure quality and how any necessary quality corrections will be implemented. Quality is defined as the totality of features and characteristic of a product that bears on its ability to satisfy stated or implied needs. Quality management is the process of defining the strategy and methods the project will deploy to ensure the project's deliverables are of acceptable quality before they are delivered to the client.



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- **Human Resource Management** – Describe the approach for staffing the project and how resources will be managed throughout the life of the project. Estimate the approximate number of required resources. Outline any special skills or training necessary to complete project work, security clearances that may be necessary, the vehicles that will be used to manage resources, etc.
- **Communications Management** – Describe the approach to communicating information to project stakeholders. Outline the key internal and external stakeholders that comprise the communications audience. Define the approach that will be used to communicate with these stakeholders, including messages, messengers, vehicles, and timing.
  - **Communication Matrix** – The Communications Matrix is a tool for capturing the communications approach information presented in the Communications Management Plan. It is used as an initial planning tool and for ongoing tracking and reporting of the progress of project communications activities.
- **Risk Management** – Describe how risks associated with the project will be managed. Outlines what risk management activities will be conducted and how they will be performed, recorded, and monitored throughout the life of the project. Risk management is the process of identifying, assessing, responding to, monitoring and reporting risks.
  - **Risk Log** – The Risk Log is a tool used to record and manage the risks identified during the project. It is normally maintained as a separate document that is used to document risk related information such as the likelihood of occurrence, potential project impact, potential cost, mitigation strategies, and contingency plans.
- **Issue Management** – Describe how issues associated with the project will be managed. Outlines what issue management activities will be conducted and how they will be performed, recorded, and monitored throughout the life of the project.
  - **Issue Log** – The Issue Log is a tool used to record and manage the issues identified during the project. It is normally maintained as a separate document that is used to document issue related information such as the issue description, action steps, impact summary, priority, etc.
- **Procurement Management** – Describe how goods and services will be procured from outside the project/organization.
- **Compliance Related Planning** – Insert a list of compliance related processes the project must adhere to. For assistance with determining which compliance processes need to be followed visit [http://www2.cdc.gov/cdcup/document\\_library/project\\_assessment.asp](http://www2.cdc.gov/cdcup/document_library/project_assessment.asp)

## Best Practices

The following best practices are recommended for **Project Management Plan** development:

- **Customer Requirements** – Confirm customer requirements for scope and their priority.
- **Review and Approve** – Defined management plans should be reviewed and approved by the project manager.
- **Read It** – Make sure that the PMP is read. Share it with those impacted by, or contributing to, the project.
- **Make Updates** – As the project environment changes updates in the form of appended change requests should reflect any changes to the PMP and/or its subsidiary plans.

## Practice Activities

For projects the following practice activities are appropriate:

- Complete the Project Charter
- Complete the Project Management Plan
- Complete project sponsor review
- Obtain final written project sponsor approval



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### Practice Attributes

This section provides a list of practice attributes to help project teams determine when and how development of a **Project Management Plan** impacts a project.

<b>Practice Owner</b>	CDC UP Project Office – NCPHI
<b>Criteria</b>	All projects regardless of type or size should have some type of document outlining how project activities will be managed.
<b>Estimated Level of Effort</b>	Moderate
<b>Prerequisites</b>	N/A
<b>Practice Dependencies</b>	N/A
<b>Practice Timing in Project Life Cycle</b>	Developing a Project Management Plan is an activity that takes place early in the project life cycle with updates and refinements made throughout the project's life, if necessary.
<b>Templates/Tools</b>	Project Management Plan Template, Project Management Plan Checklist
<b>Additional Information</b>	N/A

### Key Terms

Follow the link below to for definitions of project management terms and acronyms used in this document.  
<http://www2.cdc.gov/cdcup/library/other/help.htm>

### Related Templates/Tools

Below is a list of template(s) related to this practice. Follow the link below to download the document(s).  
<http://www2.cdc.gov/cdcup/library/matrix/default.htm>

- Project Management Plan Template
- Project Management Plan Checklist