**HOW TO USE THIS TEMPLATE:**

### Introduction

The template reflects the steps set out in the PRINCE2 Method and is designed to prompt the Project Manag­er and help in the creation of Project, Stage and Team-level Plans. There is also a Product Description for Plans at Appendix A of the PRINCE2 Manual.

Loading the file

This template has been produced using Microsoft Word 2003. To use it, load up the file directly from the directory and starting from page 1 follow the prompts (in [...] brackets).

Deleting the [....] text

When the template is complete, the whole Plan can be printed and ap­proved.

Prior to printing, you should delete all [....] prompt text.

Saving the Plan under its own name

Save the Plan by selecting the “SAVE-AS” command; this will avoid overwriting the standard template. You must specify your own Project Directory.

**Once your Plan is complete check the document against the following Quality Criteria:**

* The plan is achievable
* Estimates are based on consultation with the resources, 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 or programme 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 Strategy, Configuration Management Strategy, Risk Management Strategy, Communication Management Strategy and project approach
* The plan supports the management controls defined in the Project Initiation Documentation

PROJECT DOCUMENTATION

#### PLAN

|  |  |
| --- | --- |
| **Project:** |  |
| Release: |  |
| Date: |  |
|  |  |
| **PRINCE2** |  |
|  |  |
| Author: |  |
| Owner: |  |
| Client: |  |
| Document Ref: |  |
| Version No: |  |

# 1 Plan History

## 1.1 Document Location

This document is only valid on the day it was printed.

The source of the document will be found at this location – *[insert folder structure]*

## 1.2 Revision History

**Date of this revision**:

**Date of next revision**:

|  |  |  |  |
| --- | --- | --- | --- |
| **Revision date** | **Previous revision date** | **Summary of Changes** | **Changes marked** |
|  |  | First issue |  |

## 1.3 Approvals

This document requires the following approvals.

Signed approval forms should be filed appropriately in the project filing system.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Signature** | **Title** | **Date of Issue** | **Version** |
|  |  |  |  |  |

## 1.4 Distribution

This document has been distributed to:

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Title** | **Date of Issue** | **Version** |
|  |  |  |  |

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## 3 Plan Description

[A brief description of what the plan encompasses (i.e. project, stage, team, exception) and the planning approach]

## 4 Plan Prerequisites

[Any fundamental aspects which must be in place, and remain in place, for the plan to succeed]

## 5 External Dependencies

[Any external dependencies which may influence the plan]

## 6 Planning Assumptions

[Any assumptions upon which the plan is based]

## 7 Lessons Incorporated

[Details of relevant lessons from previous similar projects which have been reviewed and accommodated within this plan]

## 8 Monitoring and Control

[Details of how the plan will be monitored and controlled]

## 9 Budgets

[Covering time and cost, including provisions for risks and changes]

## 10 Tolerances

[Time, cost and scope tolerances for the level of plan (it may also include more specific stage or team level risk tolerances)]

## 11 Product Descriptions

[Covering the products within scope of the plan (for the Project Plan this will be the project product; for the Stage Plan this will be the stage products; and for a Team Plan this will be a reference to the Work Package assigned). Quality tolerances are defined in each Product Description]

## 12 Schedule

[Which may include graphical representations of:

* Gantt or bar chart
* Product breakdown structure (see Appendix D for an example)
* Product flow diagram (see Appendix D for an example)
* Activity network
* Table of resource requirements – by resource type (e.g. four engineers, one test manager, one business analyst)
* Table of requested/assigned specific resources – by name (e.g. Nikki, Jay)]