

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. 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, 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.

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

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

4 Plan prerequisites

[Containing any fundamental aspects that must be in place, and remain in place, for the plan to succeed]

5 External dependencies

[That may influence the plan]

6 Planning assumptions

[Any assumptions upon which the plan is based]

7 Deliver approach(es)

[to be used]

8 Lessons incorporated

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

9 Monitoring and control

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

10 Budgets

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

11 Tolerances

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

12 Product descriptions

[(see section A.17) Covering the products within the scope of the plan (for the project plan this will include the project's product; 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]

13 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)]