Enter Project Name

Project Management Plan (PMP) Kickoff

Month, Day, Year

Purpose

The Project Management Plan (PMP) is a formal, approved document used to manage project execution. The PMP documents the actions necessary to define, prepare, integrate and coordinate the various planning activities. The PMP defines how the project is executed, monitored and controlled, and closed. It is progressively elaborated by updates throughout the course of the project.

The PMP is also a communication vehicle for ensuring key stakeholders share an understanding of the project.

The PMP is **NOT** a project schedule. A project schedule lists planned dates for performing tasks and activities to meet milestones identified in the project plan.

Project Scope

- **Business Purpose, Objectives and Goals:** A concise statement of the project purpose, objectives and goals. This information should come from the Project Charter.

- **Problem/Opportunity Statement:** Problem/Opportunity Table from the Project Charter.
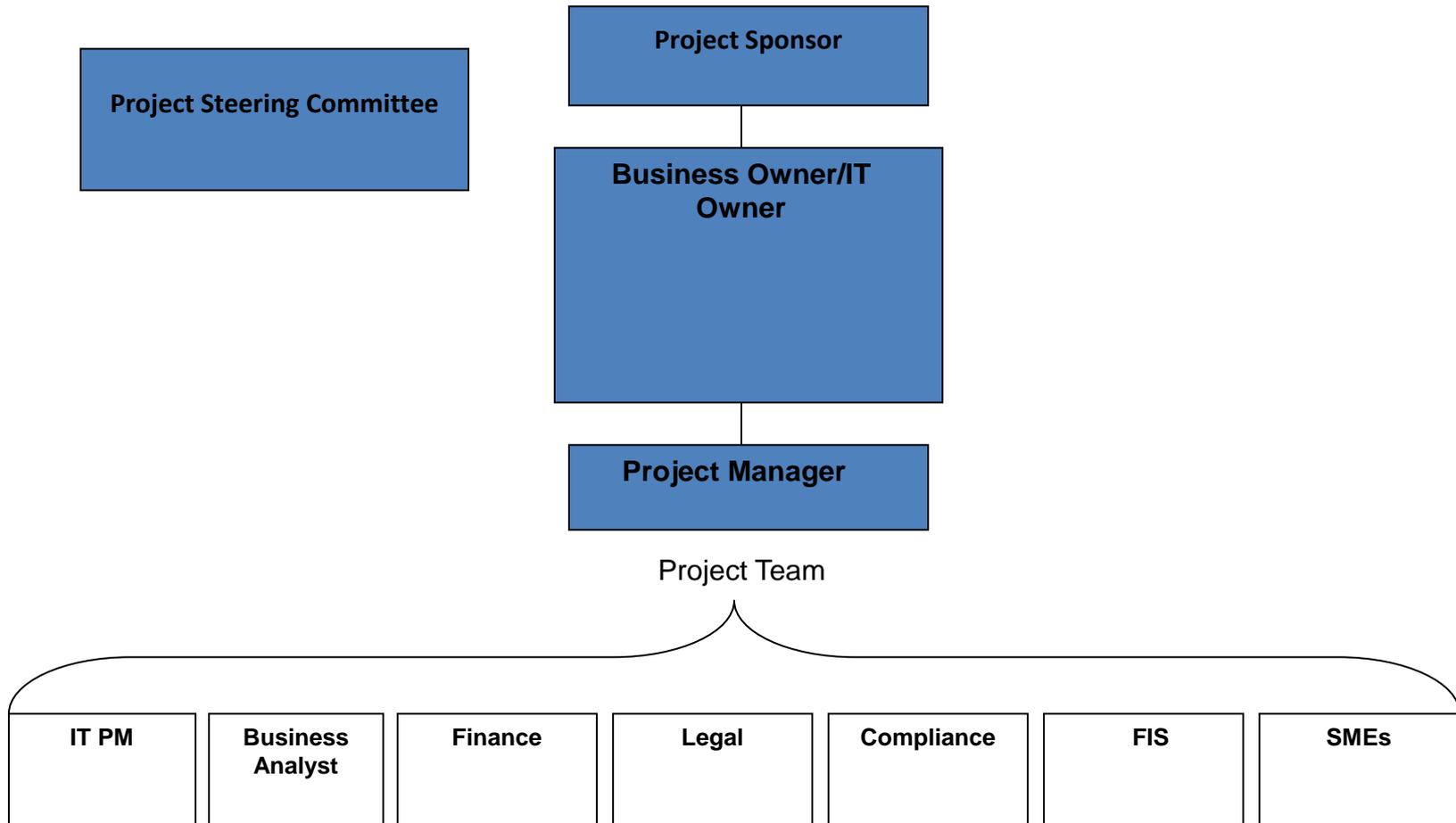
Project Constraints

- **Inclusions:** Indicate key deliverables, requirements and/or functionality that the project is committed to delivering. Information should come from Project Charter.

- **Exclusions:** Indicate key deliverables, requirements and/or functionality that is explicitly excluded from the project's scope. Information should come from Project Charter.

- **Key Assumptions:** Specify any assumptions that are driving the project approach. Information should come from Project Charter.

Project Approach

Provide a high level overview of the project approach, including:

- Whether to build or buy
- Whether the product(s) of the project will be delivered iteratively (e.g. phases/releases/tracks, etc.)
- Whether significant, discrete work packages will be managed as official subprojects

Project Organization

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                              ┌─────────────────────┐
                              │   Project Sponsor   │
                              └─────────────────────┘
┌─────────────────────────┐              │
│ Project Steering        │   ┌─────────────────────┐
│ Committee               │   │  Business Owner/IT  │
│                         │   │       Owner         │
└─────────────────────────┘   │                     │
                              └─────────────────────┘
                                        │
                              ┌─────────────────────┐
                              │   Project Manager   │
                              └─────────────────────┘
```

Project Team

IT PM	Business Analyst	Finance	Legal	Compliance	FIS	SMEs

Key Roles and Responsibilities

Project Steering Committee:
- Represents executive stakeholder interest in the project
- Provides strategic advice to Project Sponsor and Business Owner regarding trade off decisions and issue resolution
- Acts as Change Control Board for project change requests
- Actively participates in regular assessment of overall project health discussions and meetings to ensure:
  - Project vision is on track
  - Approval of Change Requests
  - Impact to customer/employee experience
  - On track with budget allocation

Project Sponsor:
- Secures organizational support and funding for the project
- Defines strategic objective of the project
- Participates in project level governance
- Makes final, critical project decisions, when needed

Business Owner:
- Defines project scope, objectives and success criteria
- Provides direction and high level business requirements
- Provides oversight of the integrity of the value proposition throughout the project lifecycle
- Provides oversight of project progress and direction through review and approval of key work products
- Participates in project-level governance activities
- Resolves escalated business issues
- Accountable for Business Case
- Contract Management

IT/Technical Owner:
- Provides oversight of the overall quality of the technology deliverables
- Ensures adherence to technical governance processes
- Resolves escalated technology issues, including technology resource contention

Key Roles and Responsibilities (continued)

Overall Project Manager:
- Accountable for overall execution, management and delivery of a project (scope, budget, and schedule)
- Establishes and facilitates the project level governance team
- Provides leadership of project team
- Responsible for project artifacts
- Plans and manages project activities
- Manages project schedule and costs
- Tracks and reports project progress
- Manages stakeholders
- Manages and resolves issues and risks

Technical Project Manager:
- Manages IT services regarding the development and implementation of the project
- Coordinates departmental or cross-functional technical teams
- Ensures completion of the technical deliverables within the triple constraints
- Coordinates and aggregates project sizing efforts across IT
- Manages IT activities and tasks and updates project schedule
- Supports overall project manager in monitoring and reporting project health and status
- Responsible for procuring hardware and software

Business Analyst:
- Investigates and analyzes business problems and manages the discovery and documentation of requirements
- Facilitates communication between the business and technical teams
- Responsible for Test Management

Project Team Members:
- Perform tasks as assigned in the Project Plan

Project Key Stakeholders

Strive to identify as many stakeholders as possible, as early in the project as possible.

Stakeholder	Representative	Responsibilities
List all groups that may be affected or have an interest in the project.	List the specific person(s) who will represent the stakeholder group on the project team.	Describe the group's interest, including direct impact and corporate oversight concerns.

Risk/Issue/Dependency Review

Review critical issues and risks already identified. If no mitigation strategy exists, discuss steps being taken to create one. This is a high level overview, not a detailed listing of issues and risks. This information should come from the Project Charter.

Risk/Issue	Impact	Mitigation Strategy
Risk: Describe risk	Explain the probability and potential impact on project, including effect on benefits, scope, time or cost.	Outline steps being taken or planned to reduce the probability/impact of the risk.
Issue: Describe issue	Explain impact on project, including effect on benefits, scope, time or cost.	Outline steps being taken or planned to resolve the issue.
Dependency: Describe dependency	Explain how the project depends on an external effort, or how an external effort depends on the project.	Outline the communication and other plans for keeping the efforts coordinated.

Preliminary Schedule of Deliverables

Add additional tables if the project includes multiple phases, subprojects, etc., that each have their own lifecycle.

Planning	Execution	Closing
Date range or TBD	Date range or TBD	Date range or TBD
• Key deliverables • Significant Milestones	• Key deliverables for each sub phase (Design, Build, Test, Deploy) • Significant Milestones for each sub phase (Design, Build, Test, Deploy)	• Key deliverables • Significant Milestones

Preliminary Project Financials

	Q1	Q2	Q3	Q4	Year 1 Total	Year 2 Total	Project Total
Budget Allocation *(if any)*							
Forecast							
Approved Baseline *(if any)*							
Actuals *(if any)*							
Variance *(if any)*							

Project Communication

- **Project Document Storage:** All project documents will be stored on SharePoint, *(include link)*

- **Project Events/Team Availability:** Team events (including availability impacts such as vacations) will be tracked on the SharePoint site (at Project Manager's discretion)

- **Project Tracking:** Critical project milestones, resources, signoffs, governance activities, risk/issues/change requests will be tracked in _____

- **Outlook Distribution Lists:** (if any)

Project Communication (continued)

Purpose	Audience	Timing/Frequency	Method/Channel	Responsible
Meeting/Report Name and purpose of the meeting or report	Audience for this meeting or report	Day, time and occurrence of this meeting or report	Method being used for this communication (e.g. Conference Room or number)	Person responsible for the communication

Change Management

Even positive change needs to be controlled, if the project is to meet its objectives on time and within budget. Change Management helps a project team ensure successful delivery of the business case. This project will conform to Bank of the West's standard Change Management Process:

Different aspects of the project will be subject to change control during different phases:

Type	Planning	Execution: Design Subphase	Execution: Build through Deploy Subphases
Benefits	N/A	• Expected benefits as baselined in the Planning Business Case • Approved Change Requests	• Expected benefits as baselined in the Execution Business Case • Approved Change Requests
Financials	N/A	• Total cost of project as baselined in the Planning Business Case • Approved Change Requests	• Total Cost of project as baselined in the Execution Business Case • Approved Change Requests
Scope	N/A	• Scope and Features as baselined in the Project Charter • Detailed Requirements • Approved Change Requests	• Scope and Features as baselined in the Project Charter • Detailed Requirements • Detailed Design • Approved Change Requests
Timeline	N/A	• Timeline to complete Execution: Design Subphase as Baselined in Planning • Approved Change Requests	• Timeline to complete project as Baselined in Execution • Approved Change Requests

PM-COP Artifact ID: P02.00

Change Management

The following signatures are required for the following aspects of this project:
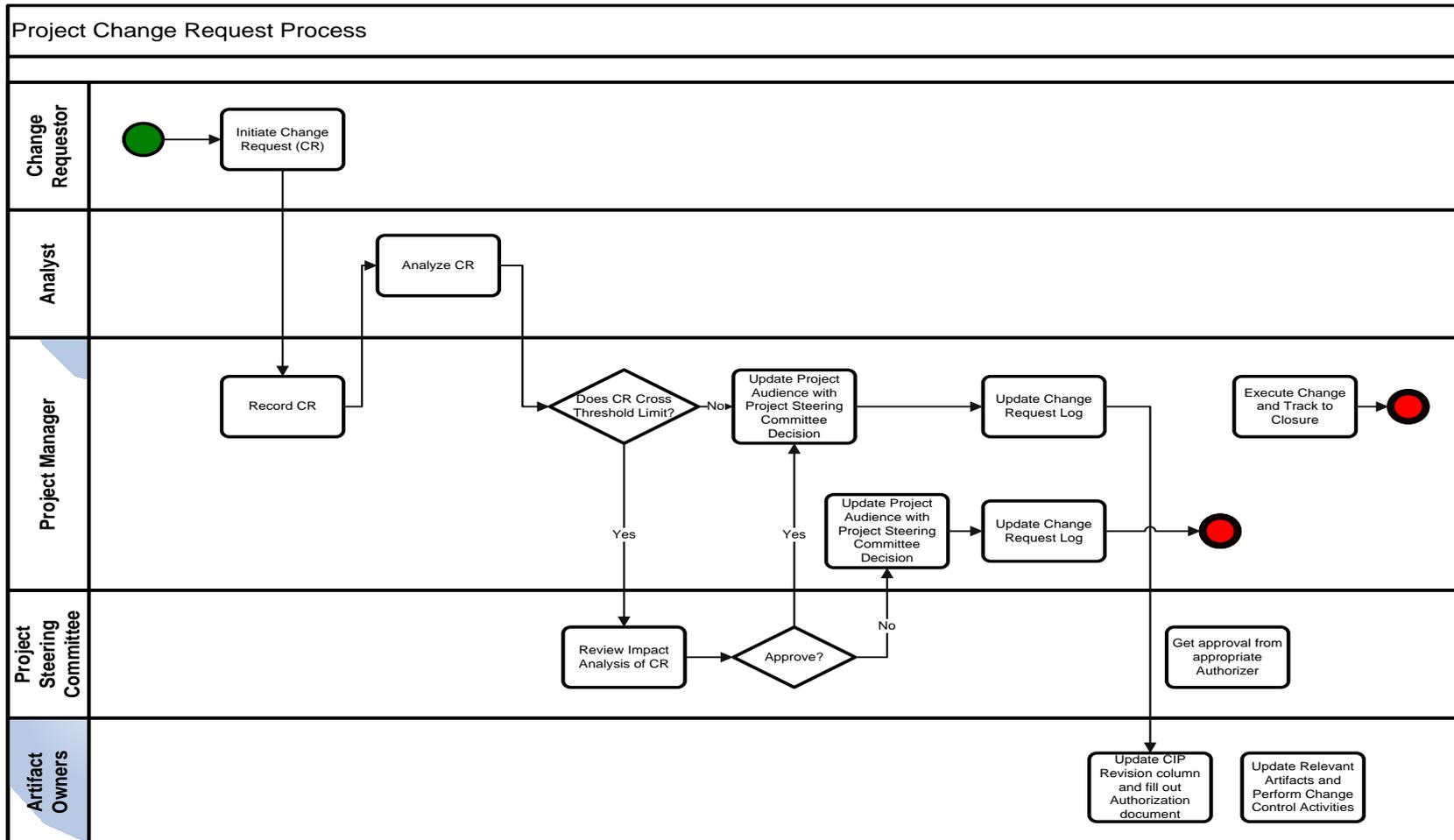
Scope Changes:
- [Name]
- [Name]

Financial Changes:
- [Name]
- [Name]

Timeline Changes:
- [Name]
- [Name]
- [Name]

Change Management Request Process

Project Change Request Process

Lane	Activities
Change Requestor	● → Initiate Change Request (CR)
Analyst	Analyze CR
Project Manager	Record CR → Does CR Cross Threshold Limit? → (No) Update Project Audience with Project Steering Committee Decision → Update Change Request Log → Execute Change and Track to Closure ● ; Update Project Audience with Project Steering Committee Decision → Update Change Request Log → ●
Project Steering Committee	Review Impact Analysis of CR → Approve? (No) ; Get approval from appropriate Authorizer
Artifact Owners	Update CIP Revision column and fill out Authorization document ; Update Relevant Artifacts and Perform Change Control Activities

Risk and Issue Management

The information below is static. How Risk are managed on projects is documented in the Risk Management Plan (link below).   Issues are documented via the Issues link on the Project SharePoint site and expectation is that these are reviewed on a regular basis with the Business Owner, project team and other key stakeholders as appropriate.

Risk	A potential undesirable and unplanned event or circumstance, *anticipated in advance*, which could prevent the project from meeting one or more of its objectives.
Issue	An event or circumstance that *has occurred* with project impact that needs to be managed and resolved, with escalation if appropriate.

▸ Link to [Risk Management Plan](#)

Financial Management

Financial Baselines:

- End of Planning: Financial estimates are baselined in the Planning Business Case. Expectation is the estimate will be plus or minus 25% in terms of accuracy.

- End of Execution Design sub-phase: Financial estimates are fully baselined in the Execution Business Case. Expectation is the estimate will be plus or minus 10% in terms of accuracy.

Status Reporting:

- When financials are reported on in the monthly status report, the last project financial baseline is what is used when determining colors. The color guidelines should be used as reference.

Next Steps

Add activities and Milestones that are coming up in the near term and would be of interest to the audience for the Project Management Plan.

- **Activity 1**
- **Activity 2**

- **Milestone 1**
- **Milestone 2**