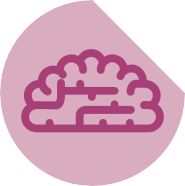
**Project Plan Template Best Practice and Checklist**



Please use this Project Plan Template Best Practice and Checklist to help you complete your project plan template using our years of experience of managing projects in the fmcg world.

Here is the template:



# Filename

* Please use the filename as follows: ‘– <Your Project Title> - <Your initials>

<Date today>. For example: ‘Project x - DAS 16-03-16’. The filename is updated each time that you amend the file.

* If you are using dropbox don’t use ‘&’ and other symbols in the filename because dropbox doesn’t like symbols in filenames and has a strop!

# Title section

* In the ‘Title’ white box use the title of your project.
* Make the title clear enough to be understood and also balance this with great PR – Using the newspaper headline of the day can work well.
* Include ‘(Quick Win)’ if your project is chosen as a quick win project.

# Project Owner section

* Put the project owner’s name, which is the same as the ‘accountable’ person’s name, in this box. See ‘Communication’ later in these pages for ‘Accountable’.
* Include a status below the person’s name that will change as you progress the project. The example is: ‘July 2016-£1m’. This means that the time is green – Ok, and that the objectives are red – A problem.

# Objectives section

* Each objective needs to be SMART:
  + Specific
  + Measurable o Achievable o Realistic
  + Time bound

A further explanation is available here: https://en.wikipedia.org/wiki/SMART\_criteria

# Start and end dates section

* The start date is when the project was conceived.
* The end date is one month after the project has started delivering its value. This last month allows for a review of the project, i.e. If the project is due to start delivering its objectives in July, then August is the end date.
* Why review?
  + Develop a continuing relationship with your sponsor so that they are happy to come back to you next time.
  + Earn credibility with your sponsor because you demonstrate openness and encourage the same from them.
  + Become more effective and efficient as a project manager.
  + Help others in your project team to learn and perform more effectively on future projects.
  + Negotiate and ensure your needs on projects are met on future projects with your sponsor.
  + Improve your project management process and share it with the whole team.
  + End the project on a high note.
  + Clear the air.
  + Identify development needs for individuals.
  + Say thank you to the team.

# Why section

* Write 3 reasons why this project is going ahead. These are different to the objectives and might be written as more ‘problem based’, e.g. ‘The sales are low are very low and we need a solution to increase the sales.’.
* Include what would happen in this project did not go ahead. The reverse of why you are doing the project.

# Scope section

* Include the scope in this section, e.g. ‘Scope in: xyz’ and ‘Scope out: abc’. Consider ‘boxing-in’ the project and protecting what is included in the project. For example, which products are in, which sites are in, which processes are out

– It may help to consider ‘scope creep’ and what someone may ask you to add-in at a later date, which is better to ‘box this off’ now, rather than later. Scope ‘considered’ is also used for those projects that can not yet be classified as ‘in’ or ‘out’.

# Risks section

* Identify 7 risks for this project. Consider why the project will fail.
* Then bullet point the list of risks and add a number of 1 to 10 for how big a risk each risk is. ‘10’ shows that this will have a big impact on the project & is likely to happen, and ‘1’ shows that this will have a small impact on the project and is unlikely to happen. And for example:
* 10 - Uncompetitive on price.
* 7 – Competition may steal our business.
* Decide what to do with each risk using ‘MAT’:
  + Mitigate the risk – Can you reduce the risk?
  + Accept the risk – Can you do nothing and accept the risk?
  + Transfer the risk – Can you transfer the risk to another party?

# Communication section

* Identify who is in ‘ARCI:
  + ‘A’ is Accountable – This is one person, ‘the buck stops with them’, and is the project owner. This person can only exist in this section, not in ‘Responsible’ as well.
  + ‘R’ is Responsible – This is someone, or a group of people, that are the ‘doers’. These people get the stuff done. Also include ‘(Key)’ next to one person, if appropriate, in responsible that is imperative to get things done,

e.g. Pete (Key).

* + ‘C’ is Consulted - Someone, or a group of people, that need to be consulted because they have an input that is valuable. Also include ‘(Key)’ next to one person, if appropriate, in consulted that is imperative to consult, e.g. Julie (Key) - ‘In the loop’.
  + ‘I’ is informed and is people that just need to be told what is going on (One way communication).

# Phases section

* On a separate piece of paper break the project down into 7 large pieces. It helps to begin with the end in mind (This blog post will explain what that is: <http://www.theleadershiphub.com/vault/blogs/begin-end-mind>A group of actions that result in a milestone.
* Add a month at the start of phase to show when it will happen, e.g. ‘July – Investigate opportunities with xyz’.

# Milestones section

* The Phases are groups of actions that will lead to achieving the milestone. For example, a Phase might be to ‘Analyse the xyz database.’, and the Milestone is to, ‘Have identified 5 sales opportunities.’

# Actions section

* List the actions for the phase that you are in, e.g. ‘P1 – Get data from Bob for analysis’.
* Put the phase at the start of each action.
* If you wish to list the actions for other phases add them to page 2.

# Ways of Working section

* Write how often the project group will meet and how they will meet, e.g. face-to-face, or conference call.
* Write how the project plan will be stored, e.g. dropbox, and how the project group will communicate with each other.

# Using the Project Plan

* Have an up-to-date copy of your completed project with you at work that you can refer to.
* Scribble on the plan as you update it.
* Update the plan at least once per week.
* A plan that is scribbled-on as the plan changes lives and breathes. A plan that is perfect is only perfect on paper.
* Put the project plan is a place that you will see every day, but not on the wall because people go ‘blind’ to what is on the wall. A diary is ideal, if you look at that everyday or a notebook.

P.s. When you are ready, remember to ask for your Free Training Effectiveness Review:

<http://www.makingbusinessmatter.co.uk/free-training-effectiveness-review/>