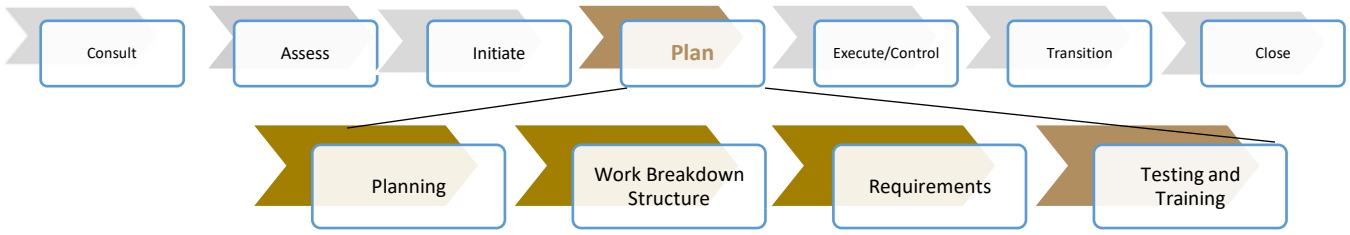
PM Methodology
Overview – Plan Phase

Project Management Office
Information Technology Services



Goal	• **Establish process for communications and for scope management** • **Identify roles and Responsibilities** • **Determine the purchasing needs**	• **Understand environment and make sure all necessary controls are incorporated into the project** • **Establish process for monitoring project status**	• **Understand how requirements will be managed** • **Clear understanding of how requirements will be gathered**	• **Established testing process that covers both IT and owner testing.** • **Establish training process that defines knowledge transfer, product training, etc.**
Key End of Phase Deliverable	• **Roles & Responsibilities** • **Communication Matrix**	• **Project Schedule** • **Deliverables Tracking**	• **Requirements Management Plan** • **Requirements Specifications**	• **Testing Plan** • **Training Plan**

Phase Overview

During the Plan Stage, the project is planned to an appropriate level of detail. The main purpose is to plan time, cost and resources adequately to estimate the work needed and to effectively manage risk during project execution. A failure to adequately plan greatly reduces the project's changes of successfully accomplishing its goals.

Project planning generally consists of:

- Determining how to plan (e.g. by level of detail, rolling wave, iteratively, etc.)
- Engaging the planning team
- Identifying deliverables and creating the work breakdown structure (see below)
- Identifying the activities needed to complete those deliverables and networking the activities in their logical sequence
- Estimating the resource requirements for the activities

- Estimating time and cost for activities
- Developing the schedule
- Developing the budget
- Risk planning
- Formal approval to proceed.

Additional processes, such as planning for communications and for scope management, identifying roles and responsibilities, and determining what to purchase are generally advisable.

For new product development projects, conceptual design of the operation of the final product may be performed concurrent with the project planning activities, and may help to inform the planning team when identifying deliverables and planning activities.

WORK BREAKDOWN STRUCTURE

The work breakdown structure (WBS) is a tree structure that shows a subdivision of effort required to achieve an objective – for example a program, project, and contract. The WBS may be hardware product, service, or process-oriented (or any combination).

A WBS can be developed by starting with the end objective and successively subdividing it into manageable components in terms of size, duration, and responsibility (e.g., systems, subsystems, components, tasks, sub-tasks, and work packages), which include all steps necessary to achieve the objective.

The work break down structure provides a common framework for the natural development of the overall planning and control of a contract and is the basis for dividing work into definable increments from which the statement of work can be developed and technical, schedule, cost, and labor hour reporting can be established.