

**Planning Summary for Project:** \_\_\_\_\_

**Version/Release:** \_\_\_\_\_

**Date of Launch Session:** \_\_\_\_\_

*Complete the demographic data for this project, and be sure all team members understand it.*

<b>Project Demographics</b>	<b>Values</b>
Project Name	
Project Code	
Work Order Number	
Customer Name/Organization	
(Provider) Project Manager	
Customer (or User) Representative	
Project Start Date	
Project Finish Date	
Total Projected Work Effort (Person-days)	
Project Type (use selection of standard codes)	
Value of Project Contract	
Phase of Project/Current Milestone	

*What are the fundamental objectives of the key participants in the project?*

<b>Project Objectives (Why is the project being done?)</b>

<b>Customer Objectives (What is the customer or user trying to accomplish?)</b>

<b>Provider Organization Objectives (What does the development organization want to do?)</b>



## Priorities for the Project – What Considerations Rule?

Consider for this project what priorities apply. When tradeoffs need to be made, what will have highest ranking? Make an initial estimate, then review the next pair of tables, and revisit your decision.

Project Priorities	Order on this Project (1, 2, 3, 4)
Cost/Resources	
Schedule/Time	
Functionality/Scope	
Reliability/Quality/Minimal Defects	

Using the tables below, consider how this project would complete each table. For each table, place one check mark in each row and each column. That is, select one factor to Optimize, one to Constrain, and one to Accept.

Now, examine your results and see if the order of priorities above still applies. Adjust as appropriate.

	Optimize	Constrain	Accept
<b>Cost</b>			
<b>Schedule</b>			
<b>Scope</b>			

	Optimize	Constrain	Accept
<b>Cost</b>			
<b>Schedule</b>			
<b>Quality</b>			

The selections made reflect the strategy for this project, in general. For example, a project which is trying to get a product to its customer (or market) early, might optimize the schedule, constrain the cost, and accept whatever scope (features) they could get in that time and cost. A project being done for a time and materials contract might optimize the features in the scope, constrain the schedule to meet goals, and accept the cost to get there. A product being built to run the new space station might optimize quality, constrain cost, and accept schedule.

Consider how your choices suggest or substantiate a project strategy.

## Project Organization

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Roles in Project	Name	Home Organization	Key Responsibilities
Project (Program) Manager			
Product Manager (User Representative)			
Team Lead(s)			
Developer(s)			
User Education			
Testing			
Logistics (Roll out/Infrastructure)			
Logistics (Help Desk, Support)			
Other: (specify)			
Other: (specify)			
Other: (specify)			

## Project Approach

*Identify the methods to be used by the project team to run the project.*

<b>Project Methods</b>	<b>Approach to Use on This Project</b>	<b>Who Responsible</b>	<b>When Needed</b>
Select Life Cycle			
Estimate Effort			
Develop Schedule			
Team Meetings (weekly?)			
Hold Milestone or Gate Reviews			
Metrics to Gather on the Project			
Configuration Management			
Software Quality Assurance			
Post-Project Review [and Post-Implementation]			





## Risks and Issues for the Project

*Brainstorm the risks to this project, as you understand it now, and use this later as input to a structured risk identification effort.*

Key Project Risks (Condition and Consequence)	Risk Action Plan	Who to Handle	When to Complete

*Identify any issues that need to go into the project issues list, and be sure that it includes any known to any member of the project.*

Description of Issue	Priority (H, M, L)	Proposed Approach	Who to Handle	When to Complete