

PROJECT SHORT NAME

Management Plan



Project Full Name

Client full name

Month Day, Year | Project Manager: Name

REVISIONS	DATE	NOTES
0.1		Initial Version. [Initials]
0.2		Updates Made. [Initials]

Table of Contents

Table of Contents	2
Introduction	3
Project Name	3
Objectives	3
Assumptions	3
Dependencies	3
Staffing Plan	3
Communication Plan	5
Project Alias	5
Internal Alias.....	5
Status Meetings.....	6
Status Reports.....	6
Review & Approvals	6
Development Locations	6
Client Sites	6
Risk Management	7
Delayed Delivery of Assets	7
Delayed Client Feedback	8
Incomplete or Inaccurate Requirements	8
Scope Creep	8
Deliverables for Research & Planning Phase	8
Timeline	9

Introduction

The Management Plan (MP) describes the high-level objectives, assumptions, staffing, and potential risks associated with **PROJECT NAME**. This document will be maintained during the development cycle as necessary.

Project Name

Project Full Name: *This is the human-friendly, long, capitalized, spaced and punctuated version of the project name. Used in emails, TCS, etc.* **PROJECT NAME**

project short name: *This is a 1-2 word "handle" that is used in document names, SVN repositories, dev and client site URLs, etc.* **project short name**

Objectives

High level objectives written out in a few sentences or bullet points.

Assumptions

What is assumed for this project to succeed? Careful documentation here can inform the authoring of subsequent deliverables. Please be specific and list as many assumptions as you can.

- Bullets are nice here.

Dependencies

Who or what are we depending on? Are other projects / tasks outside the scope of this MP important to the project's success?

- More bullets go here.

Staffing Plan

Who will work on this project? This section defines the project's team. Put TBD or N/A if you're not sure who is assigned yet.

<p>Client Relationship Manager</p> <p>Name</p> <p>email@clockwork.net</p> <p>XXX.XXX.XXXX</p>	<ul style="list-style-type: none"> • Focuses on ensuring a positive user experience for CLIENT throughout the duration of the project.
<p>Project Manager</p>	<ul style="list-style-type: none"> • Manages every aspect of the project definition and delivery in the

<p>Name email@clockwork.net XXX.XXX.XXXX</p>	<p>day-to-day work: tasks, roles, and deliverables.</p> <ul style="list-style-type: none"> Ensures that every factor of the project is aligned with the plan and goals. Shepherds work, leads people, and brings everything together to meet precisely in the end product.
<p>Strategist Name</p>	<ul style="list-style-type: none"> Articulates the goals and strategies that govern and direct every expertise areas' contribution to the project. Directs the Research & Planning phase, and as the project unfolds, keeps people and activities focused on scope and goals.
<p>Analyst Name</p>	<ul style="list-style-type: none"> Identifies ways to use data to support business goals. Identifies potential gaps in current content and/or configuration. Provides recommendations based on data analysis.
<p>Creative Lead Name</p>	<ul style="list-style-type: none"> Sets the creative vision. Guides the project's creative elements and works closely with the designer to execute the creative vision. Sometimes called creative director or art director.
<p>Designer(s) Name</p>	<ul style="list-style-type: none"> Combines the information architecture and creative vision into design mock-ups. Meets often with front-end developers to discuss intended interactions and functionality.
<p>User Experience Architect Name</p>	<ul style="list-style-type: none"> Outlines the structure and organization of the end product. Bridges design and functionality to ensure that strategic and technical considerations result in effective user experiences.
<p>Content Strategist Name</p>	<ul style="list-style-type: none"> Reviews and assesses current state of content against brand objectives and goals. Identifies new opportunities and recommends changes and enhancements to improve content resonance and performance. <p>Provides guidelines for content governance and workflow.</p>
<p>Copywriter Name</p>	<ul style="list-style-type: none"> Provides all copy and content for the site.
<p>Production Lead Name</p>	<ul style="list-style-type: none"> Oversees front-end production to ensure design and functionality come together in seamless interfaces that utilize appropriate technology. Fosters big-picture ideation, problem solving, and communication to



	achieve effective and successful user experiences.
Front End Developer(s) Name	<ul style="list-style-type: none"> Creates interfaces. Uses a variety of markup and scripting languages to apply the design concepts and information architecture to individual screens, producing a consistent and an easy-to-use end product.
Tech Lead Name	<ul style="list-style-type: none"> Oversees the technological vision, thinking, and planning on a project. Fluent in both business and technical communication. Able to translate client needs into requirements and explain technical concepts to others.
Developer(s) Name	<ul style="list-style-type: none"> Writes the code that powers the end product. Designs and constructs software to meet project requirements, and translates the written features into a working artifact.
QA/Tester Name	<ul style="list-style-type: none"> Verifies that features and functionality align with the requirements, plans, and goals established throughout the project. Confirms the design, user experience architecture, and features work according to plan.

Communication Plan

Project communications will be handled by the following:

Project Alias

Project communications go to: **email@email.com**

Included on this alias:

- Clockwork project team (listed above)
- [client names & roles listed out here]
- Project Sponsor Name** – TITLE email@email.com - XXX.XXX.XXXX
- Daily Contact Name** – TITLE email@email.com - XXX.XXX.XXXX
- Other client contacts**

Internal Alias

Internal communications shall go to: **email@email.com**

Included on this alias:

- Clockwork project team (listed above)

Status Meetings

Weekly status meetings will occur on **Date/Time**. Ad-hoc review meetings will be scheduled by the Clockwork project manager as necessary.

Status Reports

Status reports will be emailed weekly on **Day** by the Clockwork project manager.

Review & Approvals

This project will use a four-step review process:

- Internal review at Clockwork
- Initial versions of documents sent to the project alias for review.
- Review with client and CW teams to gather feedback, clarify thinking.
- Revised documents sent, with a date by which feedback must be received or documents will be considered approved.

Note: some deliverables – such as design concepts – may require an additional round(s) of feedback/review.

Client approvals will be explicitly provided by:

- **Creative/Design: client name**
- **Copy/Content: client name**
- **Legal/Regulatory: client name**
- **Technical / IT: client name**

- If client requires a third party website-level scan prior to launch, project timelines will be revisited and a change order delivered.

Other: client name

- ▢ **Question:** If legal/regulatory approvals are required, what are the expectations on the review and approval process?

Development Locations

Where concepts will be posted and dev and production versions deployed.

Client Sites

File Transfer

Assets or documents can be sent by **[CLIENT]** to Clockwork at: **Hightail address**

Transmitting Passwords

Passwords should never be sent via email. If passwords need to be transmitted to Clockwork, please transmit by phone, in-person, or via Hightail.

Review Site

Design concepts and documentation will be posted to **domain name**

User: **username**

Password: **password**

Stage Site

The stage site (for content population and client approval before launch) will be located at **domain name**

Consider this, but it can be removed if not needed. Stage still will be .htaccess protected.

User:

Pass:

Live Site

The live website will be deployed at **domain name**

Risk Management

What are the risks involved in undertaking this project, and how will Clockwork and the client strive to mitigate those risks? Include a description of each risk and a mitigation plan. Aside from the standard risks outlined below, talk to the team and brainstorm other risks. Consider: security, infrastructure, process, communication, cheating (in the case of games or contests), software, client expectations. Get creative and ask the client for their input.

Delayed Delivery of Assets

Description

Unexpected delays are encountered receiving necessary assets (copy, graphics, file structures) for the team to accomplish the design.

Mitigation Plan

The Project Manager shall stay in touch with the client in order to flag any upcoming delays early and adjust the project timeline as necessary.

Delayed Client Feedback

Description

Unexpected delays are encountered receiving feedback or approvals on copy, design or programming, affecting the team's ability to continue work.

Mitigation Plan

The project timeline will set forth expectations for feedback at the project outset. The Project Manager will flag any delays early and adjust the project timeline as necessary.

Incomplete or Inaccurate Requirements

Description

Project requirements are ill-defined or misunderstood between the client and CW teams, causing Clockwork's deliverables to not match client expectations.

Mitigation Plan

Clockwork writes – and routes for approval – a Requirements Definition document. Project work commences when the RD is approved by both parties.

Scope Creep

Description

If decisions are made during the course of the project that expand scope, the timeline or budget may be adversely affected.

Mitigation Plan

As needed, Clockwork project manager will notify client if decisions are affecting scope and deliver change orders for approval as necessary.

As needed, Clockwork will create a change order document if additional requirements are identified after the approval of the initial RD.

Deliverables for Research & Planning Phase

NOTE: The scope of the deliverables in the Management Plan will be kept up to date throughout the project and will supersede all previous documents, such as the estimate or project proposal.

Examples:

- Management Plan (this document)
- Requirements Definition
- Strategy and User Experience Brief
- User Experience Architecture (May include the following. This will be defined following the Planning phase)
 - Personas
 - User Interviews
 - Site Map
 - Wire Frames
 - Usability Testing
 - Style Guides
 - Prototypes
- Design Concepts
- Development Plan
- Stage URL (for evaluation and approval before launch)
- Quality Assurance
 - Test Plan
 - Unit Testing
- Site Launch
- Post Launch
 - Training
 - User Manual(s)

Timeline

Timeline is represented in a separate document: **document name**