

Project Management Plan: From Goals to Execution



Build one integrated plan linking strategic goals to coordinated execution



Avoid two failure modes: abstract goals or tactical task lists



Definition: master document for executing, monitoring, controlling, and closing



PMBOK 8: produced by Integrate and Align Project Plans in Governance



Roadmap: objectives, scope, baselines, risk, governance, control, tailoring, capstone



Use one real project through every exercise and template



Why Integrated Planning Matters



Only ~50% of projects rated successful; 13% fail outright (PMI 2025)



Organizations lose ~10% of every dollar invested to poor project performance



Scope creep hits 52% of projects; 85% of those overrun budget by 27%



Unstable requirements and poor communication recur as root causes



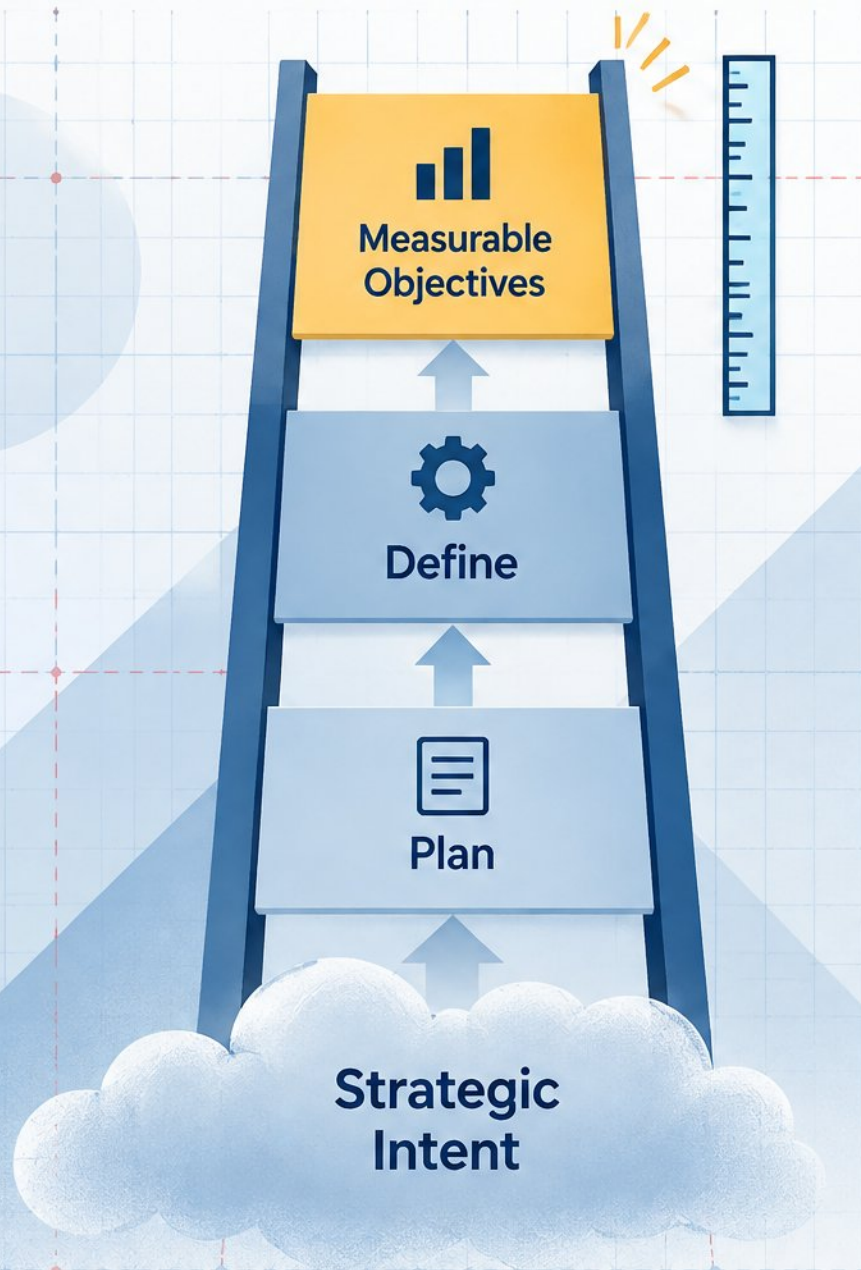
Completeness $\neq$ coherence: a full binder can hold incompatible logic



Payoff: predictability, faster decisions, credible change control



From Strategic Goals to Measurable Objectives



Translate strategic intent into SMART objectives at initiation — before scheduling



Document each benefit with a baseline, metric, and target value



Output $\neq$ outcome: "deliver training" vs. "raise pass rates 71% to 90% in six months"



Define acceptance criteria, KPIs, and the measurement source for verification



Confirm relevance with sponsor and governance body



Exercise: convert one vague goal into 2–3 SMART objectives with dates

Defining Scope and Requirements

-  1 Product scope vs project scope: know the difference
-  2 State explicitly what is out of scope to absorb future requests
-  3 Elicit requirements, then prioritize with MoSCoW or weighted scoring
-  4 WBS decomposes deliverables using the 100% rule: all scope, nothing extra
-  5 Decompose to work packages: one owner, clear acceptance criteria, estimable effort
-  6 Scope baseline = scope statement + WBS + WBS dictionary
-  7 Control every addition through formal change control; block gold plating



Workshop: Building the First-Level WBS



Build the WBS with the team, not alone — a 30-minute cross-functional walkthrough



Start with 5–9 level-2 deliverable nodes expressed as nouns, not activities



Assign responsibilities, not named resources, and add a unique WBS code



Run the 100% rule check at every level: no gaps, no overlaps, no double counting



Add the work teams forget: QA, documentation, approvals, training, handover, project management



Draft WBS dictionary entries live: description, acceptance criteria, owner, estimate range, assumptions



Building Schedule, Cost, and Resource Baselines



Sequence WBS activities, map dependencies, and identify the critical path and float



Estimate durations and costs with the delivery team using analogous, parametric, and three-point techniques



Resource leveling may move the critical path and end date; smoothing works within float, protecting the deadline



Cost-loaded activities produce planned value (PV/BCWS) and enable earned value measurement



Reflect real resource calendars and capacity constraints in the schedule – never assume them away



Baseline only when scope, schedule, cost, and resources agree; secure sponsor approval first



Risk, Quality, and Assumption Management

Risk



Named
Owner

Contingency and Management Reserves



Quality Gate



Identify, analyze, and assign a named owner to every risk



Response strategies: avoid, transfer, mitigate, accept



Fund contingency and management reserves from real risk exposure



Set one numeric metric and verification method per deliverable



Distinguish quality assurance (prevention) from quality control (inspection)



Schedule quality gates as milestones in the timeline



Treat assumptions, constraints, and dependencies as owned plan items



Unfunded risk or unscheduled gate means it isn't planned



Stakeholders, Communication, and Governance

Align people, enable decisions, and keep delivery moving.



Map power, interest, and disposition (champion to opponent) to set engagement depth



Compare current vs. desired engagement: unaware, resistant, neutral, supportive, leading



Communications matrix: what, who, format, frequency, channel, owner



Governance: decision rights, thresholds, escalation owners, response times



RACI per work package; log decisions so approvals don't stall delivery

Cross-Functional Handoff

From alignment to action, together.

Plan

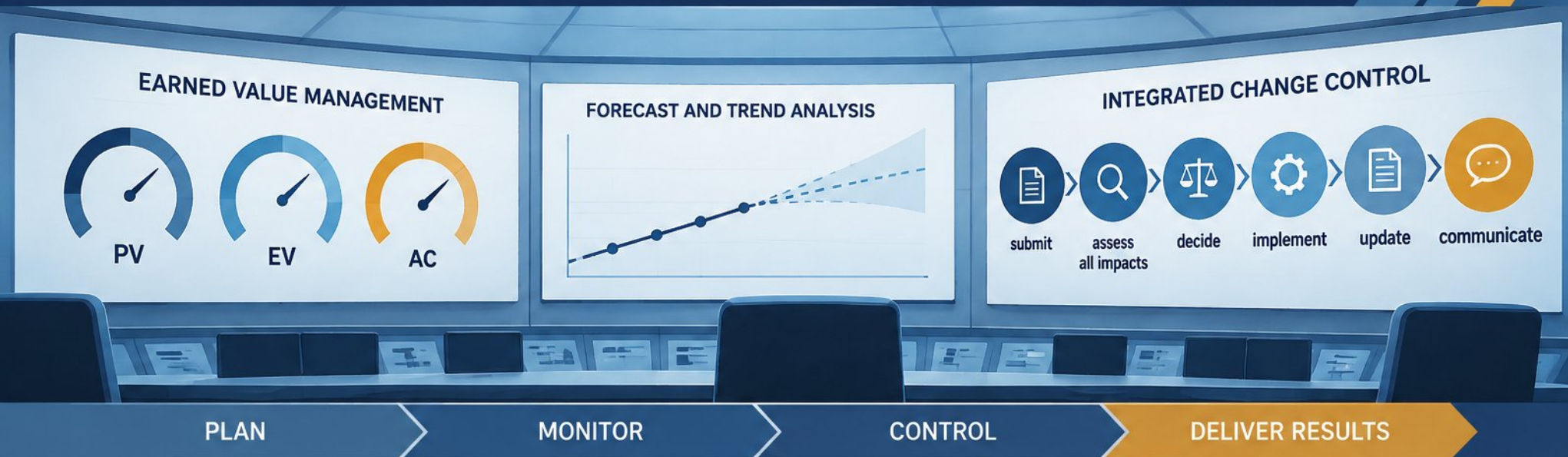
Engage

Govern

Deliver

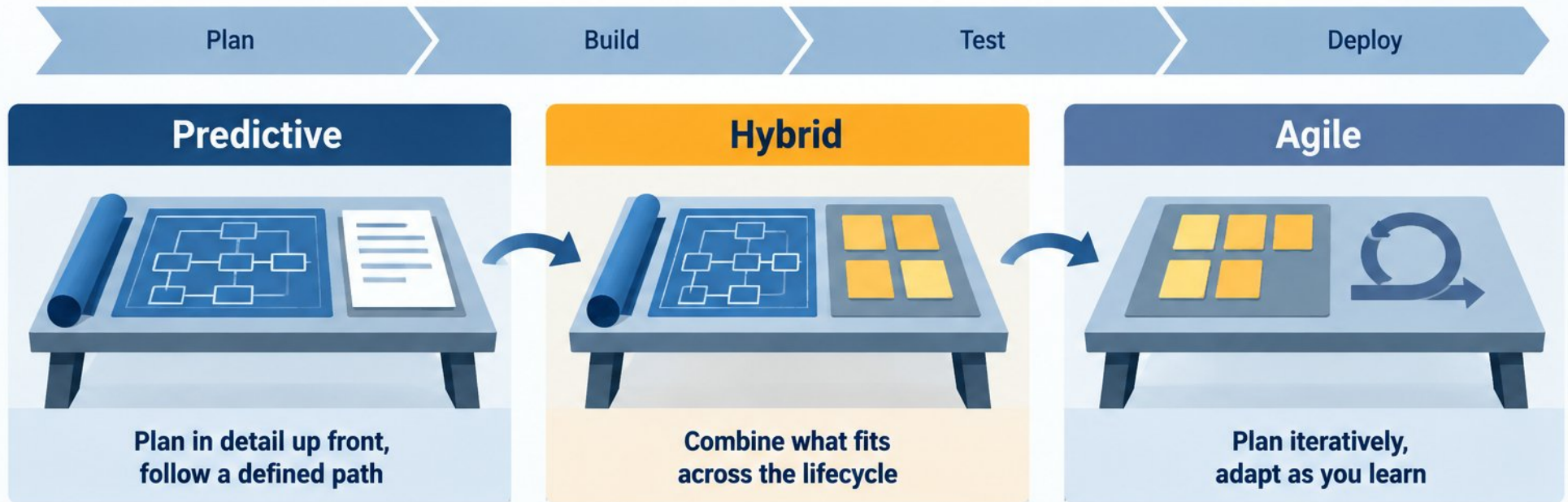
Sustain

From Plan to Execution: Monitoring, Control, and Change



-  Approval converts the plan into the governed performance measurement baseline
-  EVM basics: PV, EV, AC; $SV = EV - PV$; $CV = EV - AC$; $SPI = EV/PV$ (ISO 21508:2026)
-  Forecast with EAC and trend analysis — evidence, not optimism
-  Integrated change control: submit, assess all impacts, decide, implement, update, communicate
-  Track issues, escalation thresholds, and corrective action; distinguish updates from re-baselining
-  Report progress against original goals and benefits, not just activity completion

Tailoring the Plan: Predictive, Agile, and Hybrid



Match approach to context: goal clarity, uncertainty, constraints, regulation, vendor realities



Hybrid is now a leading approach: combine what fits, don't force one method



Two patterns: hybrid-by-phases and hybrid-by-methods across the lifecycle



Tailor artifacts by size, risk, and compliance needs



Rolling-wave planning: detail near-term work, keep later work high-level



Agile plan versions: canvas, backlog, runway, sprint cadence

Making the Plan Executable: Kickoff, Cadence, and Operating Norms



Involve delivery teams in building the plan they will own



Define decision rights, escalation paths, and response times up front



Hold a weekly integration review, separate from status reporting



Keep a live decision log and a maintained, governed baseline



Publish the operating rhythm: risk reviews, quality gates, change board



Kick off with shared understanding of why each deliverable matters



Capstone: Assembling an Integrated One-Page Plan

- 1** **Consolidate** your project plan into one page anyone can scan in two minutes
- 2** Spine: outcome, owner/date/budget, milestones, exclusions, decision path, top three risks
- 3** Write the outcome so a sceptic can mark it true or false
- 4** Name one owner for the date and one for the spend
- 5** List exclusions explicitly; give each top risk one owner and one trigger
- 6** Write the decision path with a clock: who decides, below what thresholds, in how long
- 7** **Test:** hand it to someone outside the project and ask who owns the date and what is out of scope

The image shows a template for a 'One-Page Plan' on a white card with a blue header. The card is tilted slightly to the right. It features several sections, each with an icon and a title, followed by a form area with lines for text. The sections are: 1. Outcome (target icon), 2. Owner / Date / Budget (people icon), 3. Milestones (orange circle with three dots and arrows), 4. Exclusions (no symbol icon), 5. Decision Path (clock icon), and 6. Top Three Risks (warning triangle icon). The card is set against a light blue background with a grid pattern and some orange lines in the top right corner.

One-Page Plan

Outcome

Owner / Date / Budget

Milestones

Exclusions

Decision Path

Top Three Risks

Peer Review, Defense, and Action Planning



Peer review against an integration quality checklist



Check: scope fits schedule and resources



Confirm risks are funded, quality gates scheduled, dependencies mapped



Present and defend baselines, risks, governance, and accepted tradeoffs



Anticipate challenges: conflicting baselines, unresolved assumptions, missing owners



Close common gaps before execution starts



Action plan: apply two or three practices in 30 days



Next: progressive elaboration, integrated change control, periodic integration checks



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