

2.11 SCHEDULE MANAGEMENT PLAN

The schedule management plan is part of the project management plan. It specifies how the project schedule will be developed, monitored, and controlled. Planning how to manage the schedule can include at least:

- Scheduling methodology
- Scheduling tool
- Level of accuracy for duration estimates
- Units of measure
- Variance thresholds
- Schedule reporting information and format
- Organizational procedure links
- Schedule updates

The schedule management plan can receive information from:

- Project charter
- Project management plan

It provides information to:

- Activity list
- Activity attributes
- Network diagram
- Activity duration estimates
- Project schedule
- Schedule baseline
- Risk register

The schedule management plan is an output from the process 6.1 Plan Schedule Management in the *PMBOK® Guide – Sixth Edition*. It is developed once and does not usually change.

Tailoring Tips

Consider the following tips to help tailor the schedule management plan to meet your needs:

- Add information on the level of detail and timing for WBS decomposition based on rolling wave planning.
- For projects that use agile, add information on the time box periods for releases, waves, and iterations.
- For projects that use earned value management, include information on rules for establishing percent complete and the EVM measurement techniques (fixed formula, percent complete, level or effort, etc.).

Alignment

The schedule management plan should be aligned and consistent with the following documents:

- Project charter
- Cost management plan

Description

You can use the descriptions in Table 2.11 to assist you in developing a schedule management plan.

TABLE 2.11 Elements of the Schedule Management Plan

Document Element	Description
Schedule methodology	Identify the scheduling methodology that will be used for the project, whether it is critical path, agile, or some other methodology.
Scheduling tool(s)	Identify the scheduling tool(s) that will be used for the project. Tools can include scheduling software, reporting software, earned value software, etc.
Level of accuracy	Describe the level of accuracy needed for estimates. The level of accuracy may evolve over time as more information is known (progressive elaboration). If there are guidelines for rolling wave planning and the level of refinement that will be used for duration and effort estimates, indicate the levels of accuracy required as time progresses.
Units of measure	Indicate whether duration estimates will be in days, weeks, months, or some other unit of measure.
Variance thresholds	Indicate the measures that determine whether an activity, work package, or the project as a whole is on time, requires preventive action, or is late and requires corrective action.
Schedule reporting and format	Document the schedule information required for status and progress reporting. If a specific reporting format will be used, attach a copy or refer to the specific form or template.
Organizational procedure links	The schedule outline should follow the numbering structure of the WBS. It may also need to follow the organization's code of accounts or other accounting and reporting structures.
Schedule updates	Document the process for updating the schedule, including update frequency, permissions, and version control. Indicate the guidelines for maintaining baseline integrity and for re-baselining if necessary.

SCHEDULE MANAGEMENT PLAN

Project Title: _____ Date: _____

Schedule Methodology:

Scheduling Tools:

Level of Accuracy:

Units of Measure:

Variance Thresholds:

Schedule Reporting and Format:

Organizational Procedure Links:

Schedule Updates: