

**Project Proposal Template**

This template contains instructional text to advise how to populate the various sections. Please remove the green text when you have completed the document, prior to circulating.

**Project Proposal**

**<Project Name>**

**Date**

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# Executive Summary

The executive summary should be a high-level summary of what issues or problems the project was created to correct. Typically, the executive summary also provides the background information and general statements regarding the project’s purpose or justification which will be covered in more detail in the appropriate section(s) of the Proposal.

For the past several years our company has been ...

# Project Purpose/Justification

This section describes the purpose and justification of the project in the form of business case and objectives. The business case should provide the reasoning behind the need for this project as it relates to a function of the business.

## Business Need/Case

Discuss the logic for the Business Need/Case (market demand, organizational need, customer request, technological advance, legal requirement, ecological impacts, social need, etc). This section should also include the intended effects of the business case (i.e. cost savings, process improvement, new product development, etc).

The Project has been created to ...

## Business Objectives

This section should list the Business Objectives for the project which should support the organizational strategic plan.

The business objectives for this project are …

# Project Description

This section provides a high-level description of the project. This description should not contain too much detail but should provide general information about what the project is, how it will be done, and what it is intended to accomplish. As the project moves forward the details will be developed, but for the Project Proposal, high-level information is what should be provided.

The Project will provide ...

## Project Objectives and Success Criteria

Objectives should be SMART: Specific, Measurable, Attainable, Realistic, and Time-bound. The project manager must be able to track these objectives in order to determine if the project is on the path to success. Vague, confusing, and unrealistic objectives make it difficult to measure progress and success.

The objectives which mutually support the milestones and deliverables for this project have been identified. In order to achieve success on the Project, the following objectives must be met within the designated time and budget allocations:

* …

## Requirements

The project team should develop a list of all high-level project requirements. These requirements are clear guidelines within which the project must conform and may be a result of input from the project sponsor, customer, stakeholders, or the project team.

This project must meet the following list of requirements in order to achieve success.

* …

Additional requirements may be added as necessary, with project sponsor approval, as the project moves forward.

## Constraints

Constraints are restrictions or limitations that the project manager must deal with pertaining to people, money, time, or equipment. It is the project manager’s role to balance these constraints with available resources in order to ensure project success.

The following constraints pertain to the ISA project:

* …

## Assumptions

The project team must identify the assumptions they will be working under as the project goes forward. These assumptions are what the project manager/team expect to have or be made available without anyone specifically stating so.

The following are a list of assumptions. Upon agreement and signature of this document, all parties acknowledge that these assumptions are true and correct:

* …

## Preliminary Scope Statement

The preliminary scope statement is a general paragraph which highlights what the project will include, any high-level resource or requirement descriptions, and what will constitute completion of the project. This preliminary scope statement is exactly that: preliminary. All of this information will be expanded upon in greater detail as the project moves forward and undergoes progressive elaboration.

The Project will …

# Risks

All projects have some form of risk attached. This section should provide a list of high-level risks that the project team has determined apply to this project.

The following risks for the ISA project have been identified. The project manager will determine and employ the necessary risk mitigation/avoidance strategies as appropriate to minimize the likelihood of these risks:

* …

# Project Deliverables

This section should list all of the deliverables that the customer, project sponsor, or stakeholders require upon the successful completion of the project. Every effort must be made to ensure this list includes all deliverables and project sponsor approval must be required for adding additional deliverables in order to avoid scope creep.

The following deliverables must be met upon the successful completion of the project. Any changes to these deliverables must be approved by the project sponsor.

* …

# Summary Milestone Schedule

This section provides an estimated schedule of all high-level project milestones. It is understood that this is an estimate and will surely change as the project moves forward and the tasks and milestones and their associated requirements are more clearly defined.

The project Summary Milestone Schedule is presented below. As requirements are more clearly defined this schedule may be modified. Any changes will be communicated through project status meetings by the project manager.

|  |  |
| --- | --- |
| **Summary Milestone Schedule – List key project milestones relative to project start.** | |
| **Project Milestone** | **Target Date**  **(DD-MMM-YY)** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

# Summary Budget

The summary budget should contain general cost components and their planned costs. As the project moves forward these costs may change as all tasks and requirements become clearer. Any changes must be communicated by the project manager.

The following table contains a summary budget based on the planned cost components and estimated costs required for successful completion of the project.

|  |  |
| --- | --- |
| **Summary Budget – List component project costs** | |
| **Project Component** | **Component Cost**  **€** |
|  |  |
|  |  |
|  |  |
|  |  |
| **Total** | **€TBC** |

# Project Approval Requirements

The organization must understand when the project has reached a successful completion. These criteria must be clear and should be accepted by whoever will sign-off on the project’s closeout. Once signed-off by the authorized person, the project is deemed approved and is successful as long as it has met all of the agreed upon requirements.

Success for the project will be achieved when ...

# Project Manager

This section explicitly states who is assigned as the PM, their responsibility, and authority level. Depending on the organization and scope of the project, the project manager may have varying levels of responsibility and authority for personnel, project expenditures, and scheduling.

The Project Manager’s responsibility is to manage all project tasks, scheduling, and communication regarding the project. Their team will be ...

# Authorization

This section provides the names and authorization, once signed, for the project to move forward in accordance with the information contained in this Proposal.

Approved by the Project Sponsor:

Date:

<Project Sponsor>

<Project Sponsor Title>