

Crafting a **Project Management Plan** to effectively coordinate project teams

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Project Management for Dummies



Presentation Goals

1. Understand goals of a Project Management Plan
2. Review basics on what should be included
3. Provide examples



Goals of Project Management Plan

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- Speak the same language
- Understand the project and scope
- Confirm the team
- Set expectations for communication
- Review project control requirements
- Specify risk management strategies
- Establish protocol for managing change
- Standardize expectations for quality
- Establish project standards
- Go over health, safety, security and environmental plan



Components of a Good Plan

Babbel

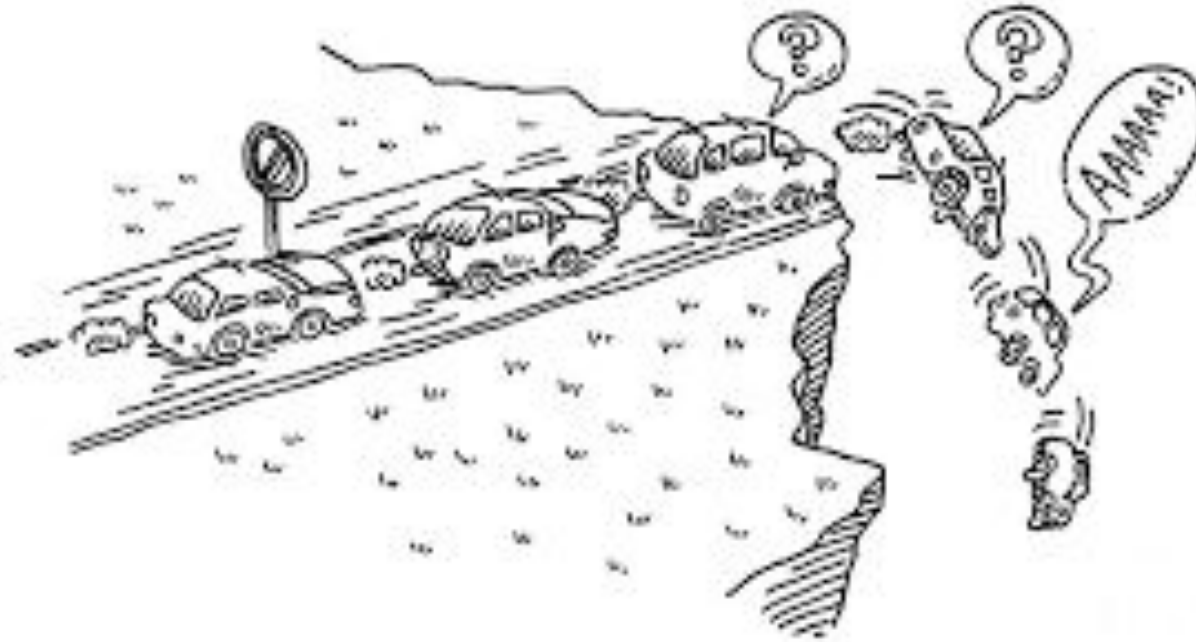
- DM : data mining, direct message
- IM : instant messaging, internet marketing, input method
- KB : kilobyte, knowledge base
- NEA : National Endowment for the Arts, National Education Association
- PM : project manager, program manager, product manager, preventative maintenance
- SME : subject matter expert, small and medium enterprise



1 | Acronyms

- Develop clear acronyms upfront
- Use acronyms that make sense
- Use acronyms that will be used more than a few times
- Avoid confusion:
 - PMP
 - PgMP
 - PgME





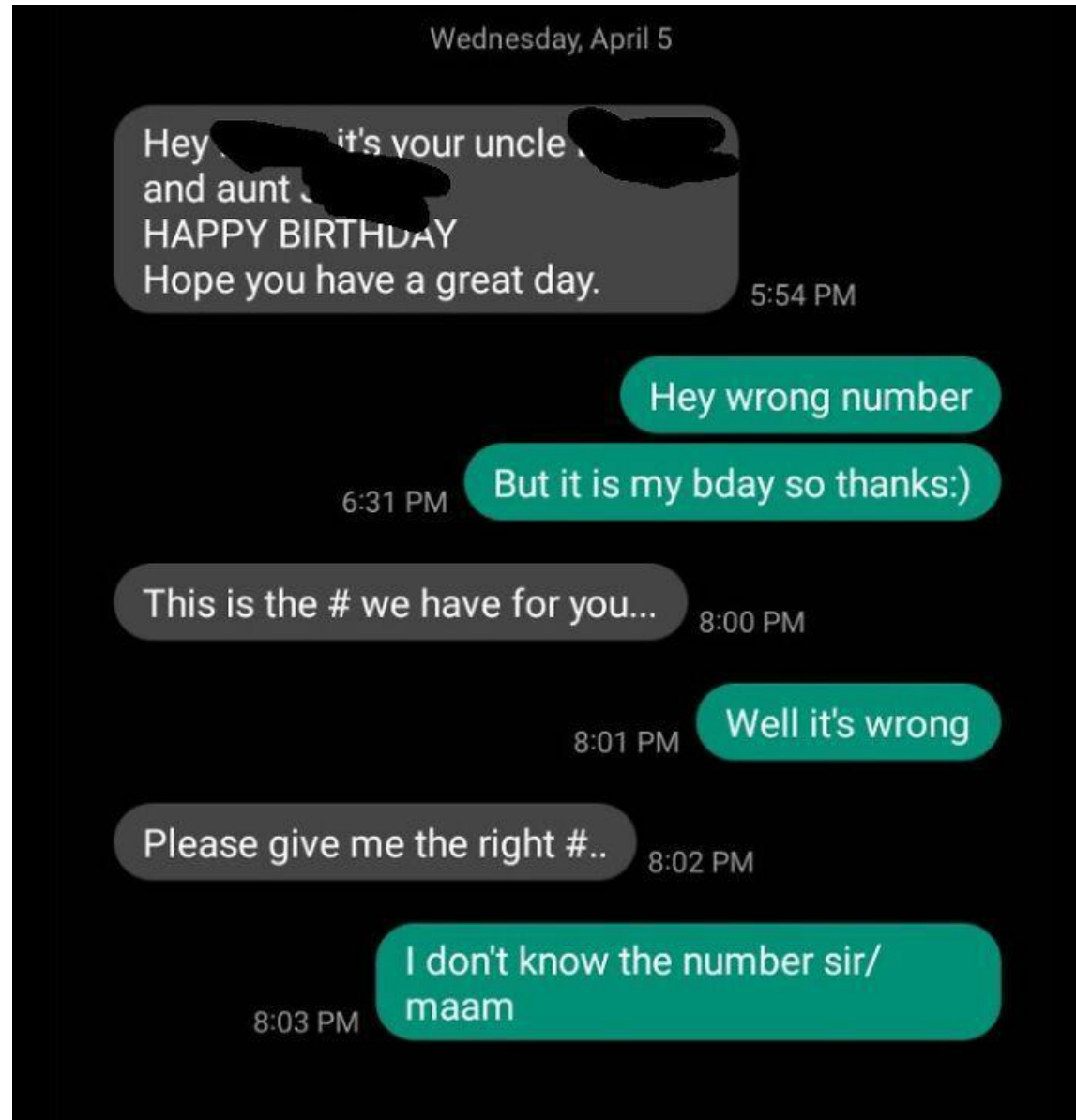
“To be naïve and easily deceived is impermissible, today more than ever, when the prevailing untruths may lead to a catastrophe because they blind people to real dangers and real possibilities.”

2 | Understand Project and Scope

1. Read the scope
2. Visit the site, understand project drivers
3. Summarize key tasks
4. Prepare schedule with milestones
5. Validate assumptions
6. Review and track all deliverables



Who's on First?



3 | Define the team

1. Who is the leader/leadership team?
2. Define roles and responsibility (RASCII)
 - Client/Owner
 - Consultant
 - Agencies
 - Stakeholders
3. Team chartering
 - Kickoff meeting
 - Networking event
 - Team building



4 | Establish Communication Expectations

1. Communication on scope/schedule/budget/quality
2. Email Protocol
 - Who to copy and when
 - Standardize email tag for filing
 - Address only those responsible to respond on “To:” line
3. Delegate / identify invoicing protocol
4. Clearly identify meeting and required attendees



Hope is not a strategy



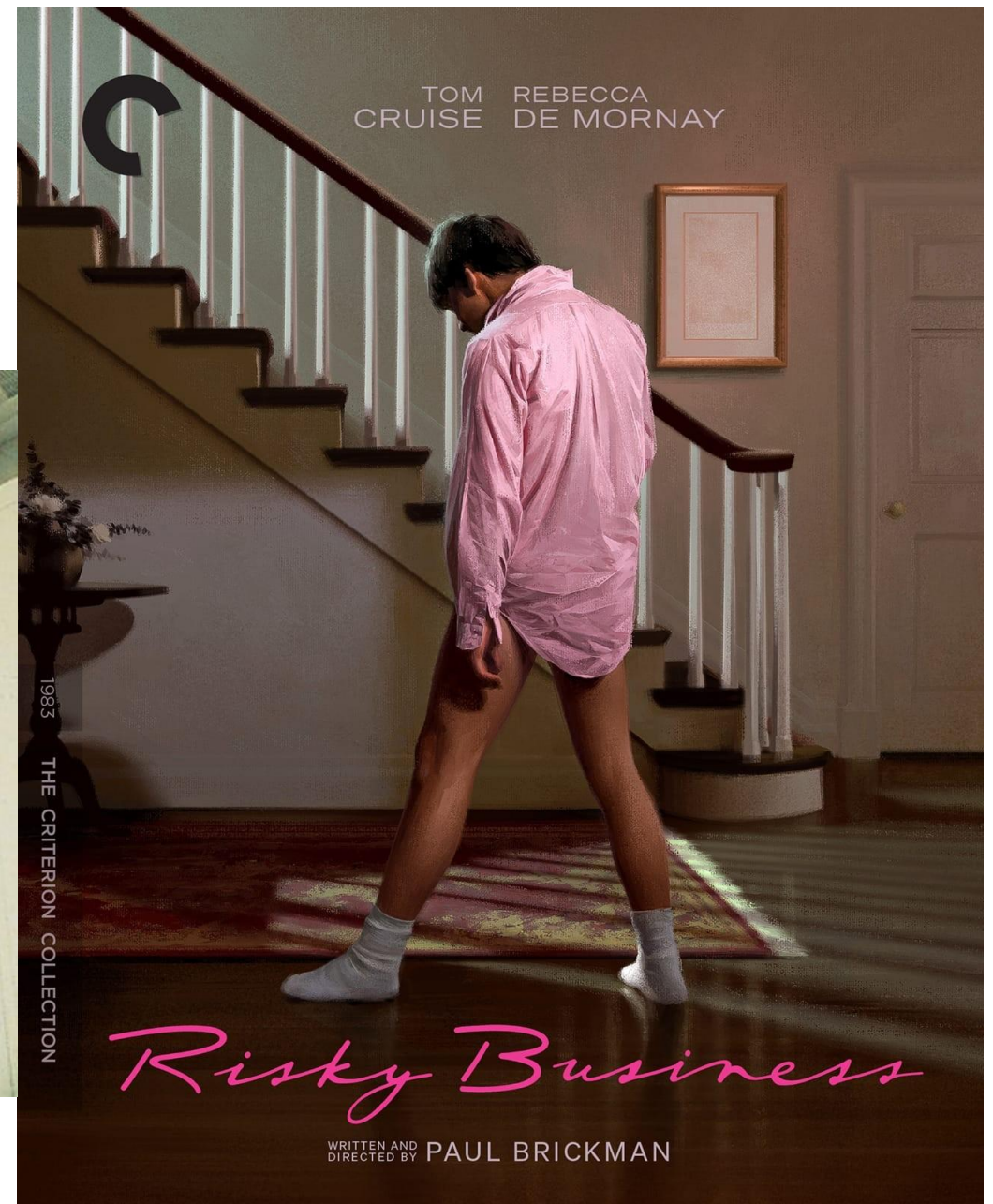
“No work on new scope/change orders without PM approval. Upon PM approval, Financial budgets are updated to reflect additional scope.”

5 | Project Controls

1. Identify organization chart and lines of authority
2. Who has signature authority, power to negotiate
3. Establish multiple lines of communication “laddering”
4. Contract / legal review / subcontracting
5. Accounting
 - Establish frequency for project health checks
 - Establish frequency for invoicing / budgeting



Not all like Tom Cruise



6 | Risk Management

1. Identify who is managing risk
2. How frequently is risk tool updated
3. Recommend using Risk Register (SharePoint)

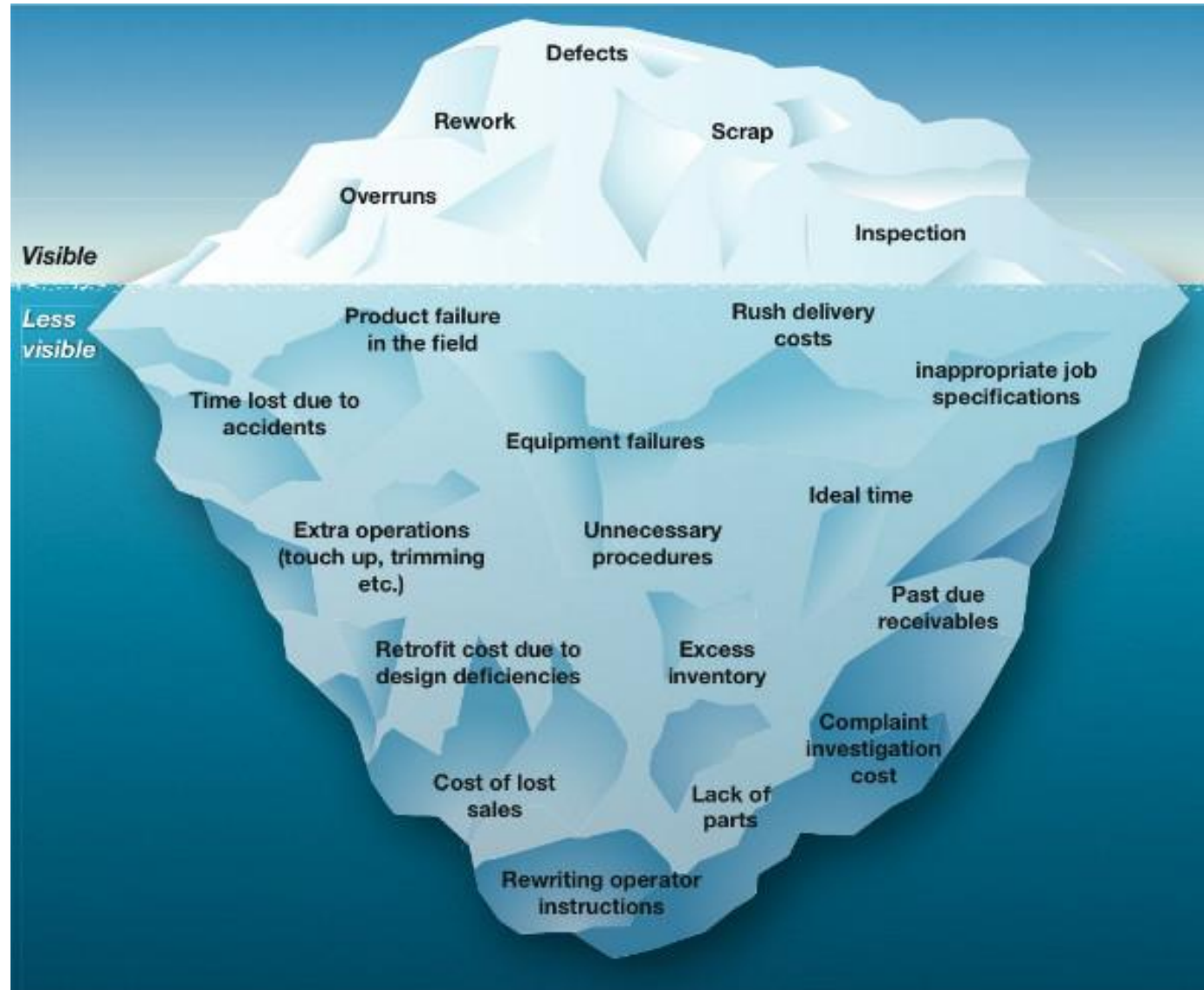
7 | Change Management

1. Establish decision log

- **Establish reporting and escalation process**
- **Transparency is key**



Poor Quality



8 | Quality Management

9 | Project Standards

1. Identify independent team member for quality control
2. Identify all deliverables
3. Identify discipline leads
4. Identify who has authority to sign, stamp, seal documents.
5. Identify review timelines
6. Identify review medium (Bluebeam, track changes, PDF markup etc.)
7. Identify project standards
8. Identify specialty tools

Benefits of Quality Management Systems



Get Everyone Home



10 | Health, Safety & Environmental

1. Identify safety manager
2. Closest hospital
3. Site and office addresses
4. Communication plan
5. Hazard analysis
 - Confined space, electrical work, overwater, poisons, chemical, heights, heat
 - Security risks
6. Prevent
 - Standardize PPE
 - Identify training (confined space),
 - Precautionary Supplies (first aid kit, water, Gatorade, etc.)



Questions:

Email me for a template 😊

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