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Project Management, project planning, templates and advice

<COMPANY OR PROJECT LOGO>

<PROJECT NAME>

<PROJECT REFERENCE>

# PROJECT PROPOSAL TEMPLATE

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VERSION <1.0>

<DD/MM/YYYY>

## DOCUMENT CONTROL

### DOCUMENT INFORMATION

	Information
Document Id	<i>[Document Management System #]</i>
Document Owner	<i>[Owner Name]</i>
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### DOCUMENT HISTORY

Version	Issue Date	Changes
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### DOCUMENT APPROVALS

Role	Name	Signature	Date
Project Sponsor			
Project Review Group			
Project Manager			

Quality Manager <i>(if applicable)</i>			
Procurement Manager <i>(if applicable)</i>			
Communications Manager <i>(if applicable)</i>			
Project Office Manager <i>(if applicable)</i>			

## CONTENTS

<PROJECT NAME> .....	1
<PROJECT REFERENCE> .....	1
<b>PROJECT PROPOSAL TEMPLATE</b> .....	<b>1</b>
<i>Version &lt;1.0&gt;</i> .....	<i>i</i>
<dd/mm/yyyy> .....	<i>i</i>
<b>DOCUMENT CONTROL</b> .....	<b>1</b>
DOCUMENT INFORMATION .....	1
DOCUMENT HISTORY .....	1
DOCUMENT APPROVALS .....	1
<b>TEMPLATE GUIDE</b> .....	<b>4</b>
<b>1. OVERVIEW AND OBJECTIVES</b> .....	<b>5</b>
1.1 BACKGROUND .....	5
1.2 SCOPE .....	5
<i>Key deliverables</i> .....	5
<i>Stakeholders</i> .....	5
<b>2. PROJECT TEAM</b> .....	<b>5</b>
2.1 ROLES AND RESPONSIBILITIES .....	6
2.2 SKILLS AND EXPERTISE .....	6
<b>3. PROJECT IMPLEMENTATION</b> .....	<b>6</b>
3.1 PROJECT TIMELINE .....	7
3.2 RESOURCE REQUIREMENTS .....	7
3.3 RISK AND CONTINGENCIES .....	8
<b>4. COST ESTIMATES</b> .....	<b>8</b>
4.1 FUNDING SOURCES .....	8
4.2 COST CONTROL AND MONITORING .....	8
<b>5. EXPECTED OUTCOMES AND BENEFITS</b> .....	<b>9</b>
5.1 KPIs .....	9
<b>6. PROJECT MONITORING AND REPORTING</b> .....	<b>9</b>
DOWNLOAD MORE PROJECT TEMPLATES .....	9

## TEMPLATE GUIDE

### ***How to use this template***

*This is a guide to the common sections included in a Project Proposal. Sections may be added, removed, or amended to suit your project. Example tables have been added (where relevant) these are just a suggestion; you may decide to format these sections differently.*

*Text in Blue italics is designed to assist you in completing the template. Delete this text before sharing the final document.*

*Example entries are provided in some places. This text is show in Red.*

## 1. OVERVIEW AND OBJECTIVES

<Provide a brief description of project with a concise statement of the primary goal(s) of the project>

Proposed project title:

Objectives:

### 1.1 BACKGROUND

<Briefly describe the context, issues, or problems the project aims to address.>

### 1.2 SCOPE

<Define the extent and boundaries of the project, including key deliverables, [stakeholders](#), and any limitations. Some example tables are shown below which you can edit or delete to suit your proposal.>

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#### KEY DELIVERABLES

<List the key deliverables or products that the project will create. Adjust the table below to suit your project.>

<b>Title/name</b>	<b>Description</b>	<b>Purpose</b>

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#### STAKEHOLDERS

<List the people/groups who will be impacted or have an interest in the project. Adjust the table below to suit your project. This will form the basis of your [Stakeholder Engagement Strategy](#) if the project goes ahead.>

<b>Name</b>	<b>Interest / role (on the project)</b>	<b>Contact details</b>

## 2. PROJECT TEAM

<Describe the proposed project team.>

- Will the team be co-located or virtual.
- How will they communicate / work together?

- Will they be seconded to the project for the duration or booked on the project for their discreet tasks?
- Will their manager or reporting lines change for the duration of the project?
- Are they internal, external?
- Are they already in post or a new hire?>

## 2.1 ROLES AND RESPONSIBILITIES

<List the key team members, their roles, and responsibilities within the project.>

<b>Role</b>	<b>Responsibility</b>	<b>Manager and reporting lines</b>

## 2.2 SKILLS AND EXPERTISE

<Describe the skills and expertise required for the project, and how the proposed team members meet these requirements.>

<b>Role</b>	<b>Skills required</b>	<b>Qualifications / level of expertise required</b>	<b>Source (new hire, internal team, contractor)</b>
<b>Developer</b>	<i>C#</i>	<i>L4</i>	<i>Global Dev team (India)</i>
<b>Copywriter</b>	<i>Marketing / brand guidelines</i>	<i>N/A existing hire</i>	<i>Our marketing team</i>
<b>Project Manager</b>	<i>Marketing and IT project delivery</i>	<i>PMP or APMP certified</i>	<i>Contractor, source via HR's approved recruiter.</i>

## 3. PROJECT IMPLEMENTATION

<In this section set out how you plan to deliver the project. Outline the approach and methods to be used. For example,>

*To establish the most appropriate approach for this project the feasibility team used a checklist to choose between a Waterfall or Agile. The results indicated that as this is a software development project without clear requirements, an Agile approach should be used. We will use Scrum as the Dev team already have experience of using it.*

### 3.1 PROJECT TIMELINE

<Provide an estimated project timeline, including major milestones, deliverables, and dependencies.

At this stage the timeline can show quarters or months rather than dates. The table below is a good example for an agile project.>

The durations for each sprint and other milestones may vary based on your specific project needs. The table above assumes two-week sprints, which is a common duration in Scrum projects. Update the expected start and end dates according to your project schedule.

Milestone #	Milestone Description	Expected Start Date	Expected End Date	Dependencies
<b>M1</b>	<i>Project Kick-off</i>	<i>[Start Date]</i>	<i>[Start Date]</i>	<i>N/A</i>
<b>M2</b>	<i>Sprint 1 - Planning and Requirements</i>	<i>[Start Date]</i>	<i>[Start Date + 2 weeks]</i>	<i>M1</i>
<b>M3</b>	<i>Sprint 1 - Development and Testing</i>	<i>[Start Date + 2 weeks]</i>	<i>[Start Date + 4 weeks]</i>	<i>M2</i>
<b>M4</b>	<i>Sprint 1 - Review and Retrospective</i>	<i>[Start Date + 4 weeks]</i>	<i>[Start Date + 4 weeks + 1 day]</i>	<i>M3</i>
<b>M5</b>	<i>Sprint 2 - Planning and Requirements</i>	<i>[Start Date + 4 weeks + 1 day]</i>	<i>[Start Date + 6 weeks]</i>	<i>M4</i>
<b>M6</b>	<i>Sprint 2 - Development and Testing</i>	<i>[Start Date + 6 weeks]</i>	<i>[Start Date + 8 weeks]</i>	<i>M5</i>
<b>M7</b>	<i>Sprint 2 - Review and Retrospective</i>	<i>[Start Date + 8 weeks]</i>	<i>[Start Date + 8 weeks + 1 day]</i>	<i>M6</i>
<b>M8</b>	<i>... (Continue for subsequent sprints)</i>	<i>...</i>	<i>...</i>	<i>...</i>
<b>MX</b>	<i>Final Sprint - Review and Retrospective</i>	<i>[Date]</i>	<i>[Date + 1 day]</i>	<i>...</i>
<b>MX+1</b>	<i>User Acceptance Testing</i>	<i>[Date + 1 day]</i>	<i>[Date + 2 weeks]</i>	<i>MX</i>
<b>MX+2</b>	<i>Deployment to Production</i>	<i>[Date + 2 weeks]</i>	<i>[Date + 3 weeks]</i>	<i>MX+1</i>
<b>MX+3</b>	<i>Project Closure</i>	<i>[Date + 3 weeks]</i>	<i>[Date + 3 weeks + 1 day]</i>	<i>MX+2</i>

### 3.2 RESOURCE REQUIREMENTS

<Detail the resources required for the project, including personnel, equipment, software, and facilities. This section might duplicate information above so it can just include non-human resources.>



### 3.3 RISK AND CONTINGENCIES

<Identify potential risks, challenges, and uncertainties, and outline contingency plans to address them. A [simple risk register](#) can be used.>

### 4. COST ESTIMATES

<Provide a detailed breakdown of the project costs, including labor, materials, equipment, software, and other expenses. For example, the table below provides a simple high-level structure for a software development project budget. You may need to add or remove budget items depending on the nature and complexity of your project.>

<b>Budget Item</b>	<b>Description</b>	<b>Estimated Cost</b>
<i><b>Personnel</b></i>	<i>Salaries and wages for developers, testers, designers, and project managers</i>	<i>[\$Amount]</i>
<i><b>Software Licenses</b></i>	<i>Cost of software tools and platforms used in development and testing</i>	<i>[\$Amount]</i>
<i><b>Hardware &amp; Infrastructure</b></i>	<i>Servers, workstations, and other hardware needed for development and testing</i>	<i>[\$Amount]</i>
<i><b>Training &amp; Development</b></i>	<i>Training and certification costs for team members</i>	<i>[\$Amount]</i>
<i><b>Outsourced Services</b></i>	<i>Third-party services, such as cloud hosting or specialized development tasks</i>	<i>[\$Amount]</i>
<i><b>Travel &amp; Accommodation</b></i>	<i>Travel and lodging costs for meetings, conferences, and other project-related events</i>	<i>[\$Amount]</i>
<i><b>Contingency Fund</b></i>	<i>Buffer for unforeseen expenses and cost overruns</i>	<i>[\$Amount]</i>
<i><b>Total</b></i>	<i>Sum of all estimated costs</i>	<i>[\$Total Amount]</i>

### 4.1 FUNDING SOURCES

<Identify the [sources of funding](#) for the project, including grants, loans, sponsorships, or internal financing.>

### 4.2 COST CONTROL AND MONITORING

<Describe the processes and procedures for monitoring and controlling project costs throughout its duration.>

## 5. EXPECTED OUTCOMES AND BENEFITS

<Describe the anticipated benefits of the project for the organization, stakeholders, and end-users.>

### 5.1 KPIS

<Define KPIs for the projected project goals and benefits. These KPIs will be used to measure the success of the project.>

## 6. PROJECT MONITORING AND REPORTING

<Describe how project progress will be monitored and controlled. Include how the project will be governed, for example, will direction be provided by a project board or steering group? Set out the governing body will be kept up to date, for example, by listing the reports that will be produced.>

### DOWNLOAD MORE PROJECT TEMPLATES

[Microsoft Project Plans](#) – real world project plans in Microsoft Project.

[Project Management Templates](#) – FREE project management templates in Word and Excel

[Stakeholder Management Templates](#)

[Flowcharts to download](#) in Visio and PDF

[Risk Register in Excel](#) – download immediately.

[Work Breakdown Structure Excel template](#)

[Work Breakdown Structure \(WBS\)](#) FREE examples to download immediately.