# Freshservice Project Plan Template

## What It Is

A comprehensive Excel project plan outlining key milestones, roles, and responsibilities for a solo or team-based implementation.

## Why It Matters

The plan provides structure to Freshservice implementations by breaking the project into manageable stages, tracking progress, and identifying ownership. It supports effective project delivery and stakeholder coordination.

## Project Plan Phases

### Kickoff & Intake

* Schedule a kickoff meeting
* Identify project stakeholders

### Requirements Workshops

* Conduct discovery sessions with key departments
* Document user stories and use cases

### Configuration Phases

* Set up ticket fields and workflows
* Configure service catalog and SLA policies

### Testing, Training, and Go-Live

* Run UAT and resolve test issues
* Conduct training for agents and requesters
* Launch the Freshservice instance to production

### Post-Launch Support

* Monitor support volumes and address hypercare issues
* Gather feedback and adjust workflows