Project Initiation / Planning Phase

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**Project
Initiation/
Planning
Phase**

Initiation Questions

Goals and Objectives

Entity Diagrams

Project Planning Document

Work breakdown Structures

Organizational Breakdown Structure

Task Planning Worksheet

Work Responsibility Matrix

Task Cost Accounting

Requirements and Constraints

Project Estimating

Scheduling Tools

Walkthroughs

Project Presentation

Project Initiation Questions

1. What information is readily available?
    Documentation from a prior structured or non-structured project?
2. Who initiated this project?
3. Who is committed to it?
4. Why were you selected for the project?
5. Why was this project started?
    Problems
    Market Competition
    New Technology
    Politics
    Next Step in the Plan
    Etc.

Project Initiation Questions

- When must the project be completed?
- What resources are available?
- How much effort has gone into the project so far?
- Are there any requirements and/or constraints you should be aware of?

Problem and Opportunity Analysis

PROBLEM ⇨

SYMPTOMS ⇧

IMPACT ⇩

⇦ SOLUTION
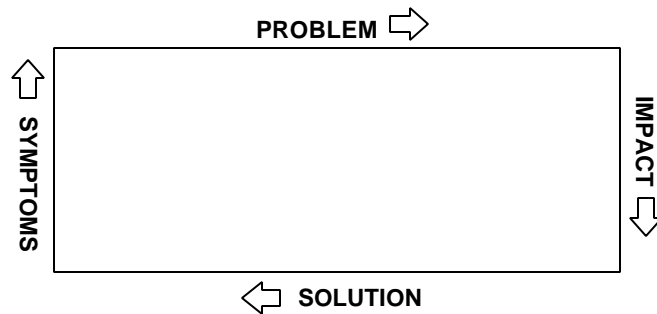
One person's _____ is often another's problem.
Identifying _____ of problems helps establish communication and commitment to solve them.
We often attempt to apply our _____ before we fully understand the _____.

Planning Definition

MISSION   Most organizations, public or private, have a mission statement. This is a macro level statement of what they are all about. It generally provides a descriptive statement of their services and/or product lines.

GOALS   Statement(s) of what is to be done. This is a high level "what." It is a statement of specific direction.

OBJECTIVE   High level "how" which includes a TIME FRAME. When is it to be done? It is a statement of a DELIVERABLE -something to measure when the job is done.

Defining Project Goals/Objectives

During this phase of the project, prepare to document:
1. The purpose of the project.
2. The project sponsor(s) and beneficiaries.
3. The project objectives(s).
4. The IMPLICIT project objectives.
5. How the project objectives relate to the organizational goals and objectives.
6. The method(s) to be used to track and document progress.
7. The method(s) to be used to evaluate project results.

Elements of Good Goals and Objectives

Action phrases
Structured
Measurable
Communicated
Business terms
Do-able

EXERCISE

Please write one goal and one objective of one of your projects or major sub-projects.

Project Scope and Processes
SCOPE:

Identify the internal sections, divisions, departments or groups that will be involved in or affected by this project.
Identify external (public / private) organizations affected by or impacting the project.

PURPOSE OF DEFINING SCOPE:
To document the impact of the project
To determine the project size
To define those affected by the process of development
To define those affected indirectly / as well as directly
To define those affected internally / externally
To define roles of responsibility and authority

Project Planning Document
PROJECT PLAN (for SMALL, MEDIUM and LARGE PROJECTS)

A. PROJECT OVERVIEW
1. Executive Summary, including problems and opportunities
2. Project goal and objectives
3. Organizational analysis
4. Requirements and constraints
5. Alternative designs and recommendations

B. WORK PLAN
1. Work breakdown structure(s)
2. Resource-loaded Gantt charts
3. Network charts and critical path
4. Management proposal

C. PROJECT TRACKING PLAN
1. Project milestones
2. Project tracking methods
3. Progress reporting
4. Contingency plan

D. EVALUATION PLAN
1. Project deliverables
2. User objectives
3. System performance
4. Problem resolution

Project Standards and Support
E. ADMINISTRATIVE PLAN
1. Methodology used
2. Procedures and standards
3. Project organization
4. Documentation requirements

F. RESOURCES PLAN
1. Resource requirements phasing
2. Skill requirements
3. Position descriptions

4. Project leader-team structures
5. Availability schedules
6. Recruitment and selection
7. Training plan

G. FINANCIAL PLAN
1. Project budget
2. Task costing procedures
3. Resource accounting procedures
4. Cash flow and capital acquisition requirements

H. FACILITIES PLAN
1. Project rooms and furnishings
2. Project equipment and support
3. Implementation requirements:
air, power, remodeling

I. CHANGE CONTROL PLAN
1. Change types and criteria
2. Change approval and procedures
3. Change documentation

J. MAINTENANCE PLAN
1. Responsibilities
2. Maintenance procedures

K. TEST AND IMPLEMENTATION PLAN
1. Test processes and scaffolding
2. Integration test plan
3. Acceptance test criteria
4. Conversion plan
5. User training
6. Ready response procedures