

Project initiation

4-6
HOURS

6-10
PEOPLE



A project initiation workshop is designed to identify the project benefits, objectives, work and resource requirements necessary to effectively deliver the project. This information helps to set our stakeholders' expectations of the possible benefits and the associated costs to realise these benefits.

The outcome is a list of agreed benefits and objectives, a work breakdown structure (WBS) with associated resource requirements needed to deliver the project.

Benefits

Often when a project starts, the work is begun in earnest and at some point in the journey the sponsor and team begin to question whether it is on the right path. Costs are increasing, milestones are being missed, more work is added trying to fix it and the right people are unavailable to help.

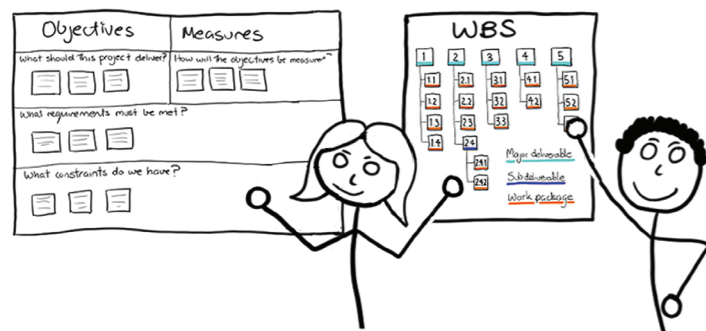
We are forced to recalibrate our thinking and make sure the objectives and the deliverables are driving the right benefits to support the business case. This recalibration often results in rework, extra costs, lost time and in some cases, the project is stopped.

This can be avoided by establishing some well thought out project benefits and objectives upfront. This provides a clear picture of the vision and can be used to guide our work and decision making throughout the project.

With sound objectives established, the team can then create a solid WBS that provides the framework for the entire project plan. The WBS structure describes the work to be delivered if the project is to realise the business benefits. It also helps to manage and control the project as it incorporates our project costs, schedule and performance.

Knowing the work, we can identify resource requirements needed to make it happen. Identifying resource requirements also helps to clarify with stakeholders their understanding of how much work is involved. It provides the first realistic estimate of the project cost, which can be compared to the potential benefits.

If the costs exceed the benefits the project can deliver, the project objectives can be revisited and lead us to recalibrate the scope of work described in the WBS. This check point is critical to ensure the project is set up for success. If the benefits are promised and the costs are unknown, then the business case will be flawed. Often projects keep spending money until the tough questions are asked and explanations demanded about why the project is over budget, late and more money is needed to finish. This is a painful situation to be in as we are confronted by our sponsor and key stakeholders. This can be avoided by applying some basic rigour described in these project initiation scenario tools.



Creating our objectives and identifying the work is only the starting point. They will continue to be validated and refined during the project as we develop a greater understanding.

Activities

Pre-work

1. Work with the project sponsor to design and plan the workshop using the planning tools.
2. Create a workshop communications deck and ask the sponsor to send it to the participants; this raises the importance of the activity.
3. Review the project background documentation including previous study reports to:
 - Create a high level project overview (what, why and who is involved?).
 - Identify the high level business benefits.
4. Create workshop posters, project initiation template and arrange a scribe to be ready for the workshop.

Steps

1. Bring everyone onto the same page using the SPACER tool.
2. Provide a common understanding of the project and the possible benefits.
3. Validate the business benefits using the benefits realisation tool.
4. Identify project objectives and measures that deliver the business benefits using the project objectives tool.
5. Identify what constraints and what requirements must be met as part of the project.
6. Identify the work that is required to deliver the project objectives using the WBS tool.
7. Identify the resources required to deliver the

8. project work using the resource requirements tool.
8. Validate the business benefits and objectives based on the work and resource requirements.
9. Document the next steps to be completed outside the workshop including communicating the outcomes.
10. Wrap up the workshop and capture feedback using the plus/deltas tool.

Post session

1. Nominated scribe to populate the project initiation template during the workshop.
2. Facilitator to finalise the project initiation template.
3. The sponsor is to validate the project initiation information and issue to the project team.
4. Conduct a project planning scenario workshop once initiation is approved.

Tips

- When identifying business benefits keep asking why. Often we initially brainstorm the required work - the deliverable. Asking a series of "whys" moves our thinking from a deliverable to the project objectives and then to identify the benefits. The last "why" in the sequence is usually the most authentic benefit.
- This first time we create a WBS it is often a high level picture of the work. We will revisit, revise, and add details to the WBS as the project is refined and planned.

Duration

- The length of the workshop will depend on the size of the project and quality of the pre-work. Having good conversations with our sponsor will focus the project and associated benefits.
- This initiation could be done in a 4-6 hour session. If working with a blank canvas, this may require more time as people must take time to get on the same page.

Tools

- Mandatory facilitation tools
- Detailed context
- Benefits realisation
- Project objectives
- Work breakdown structure
- Resource requirements
- Communication plan