

PROJECT INITIATION DOCUMENT

Project name

Draft number

Date:

Owner:	Write your name here
Client:	Write your client's name here (if you have one)

Document History

Revision History

Draft number	Date signed	Summary of Changes to draft
		You may produce a few drafts of the PID during the planning and execution of your project.
		Provide a record of your drafts here.
		Record a brief summary of changes in each draft.

Approvals

This document requires the following approvals.

Title	Name	Signature	Date of Signature
Researcher/Consultant	This is you!		
Client	You are not expected to have a client for your BAM201 work		
Supervisor	Your academic supervisor		

Distribution

This document has been distributed to:

Name	Title	Date of Issue

Purpose

To define the project, to form the basis for its management and the assessment of overall success. (Nothing to add here.)

Contents

This publication contains the following:

Topic		See Page
Background	- Essential	
Project definition	- Essential	
Project organisation structure	- Optional for BAM201	
Communication Plan	- Optional	
Project Quality Plan	- Optional	
Project tolerances	- Essential	
Project controls	- Essential	
Initial Business Case	- Optional	
Initial Project Plan	- Essential	
Initial Risk Log	- Essential	

Background

Write a brief background to the project here, eg the issue to be addressed by the project etc. (In your level 3 project you would include an outline of the client's business.)

Project Definition

Project objectives

Write here the business objectives agreed/to be agreed with your supervisor (and client for level 3 projects).

Defined method of approach

Write here a brief statement of how you will tackle the project, eg you might run a number of focus groups and undertake a content analysis of the data obtained.

Project scope

Write here a statement of the scope of the project, eg you might be concerned with all training undertaken in the sales department.

Project deliverables

Write here a brief description of what you will produce (and deliver to the client for a level 3 project). Typically this will be a report addressing the issue(s) identified in the project objectives. You might also be required to deliver other things, such as perhaps a reflective log.

Exclusions

Write here anything that someone might perhaps think would be included in your work but in fact won't be; eg you might exclude any data collection from members of your client's IT department because they're located in India.

Constraints Write here any constraints you can anticipate that might limit what you can do on your project, eg you might not have access to a car.

Interfaces Write here the names of people and perhaps departments or organizations that you will need to be in touch with during the project.

Assumptions Write here any assumptions you're making that seem important, eg the client will pay for your travel costs, that you will have access to certain people/resources, that you will get answers from the client to your questions within a certain time.

Project organisation structure

Communication Plan

Project Quality Plan

Project tolerances

Write here the acceptable margins within which key aspects of your work may vary; eg you may be aiming to conduct four interviews, but three might be acceptable.

Project controls

State here how often you are going to review the progress of the project and with whom.

Write here also the procedure for agreeing changes to the project. This will usually mean that you should write that both your client and supervisor must approve any changes.

What counts as a change? Obviously not a change in the colour of the paper on which a questionnaire is printed, for example. Any change that would lead to conflict with the project description contained in your PID should be agreed by your client and supervisor. In other cases, you will need to use your discretion, but you may be able to identify in advance key aspects of your particular project that should be subject to a proper change control procedure; if so, write them down here.

Attachments

Initial Business Case

– this must clearly state the benefits to the client of doing the project.

Initial Project Plan

– this will show when certain tasks are to be carried out. It might be in the form of a Gantt chart.

Initial Risk Log

– this will list things that you anticipate could go wrong and disrupt the project.
