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Project Management, project planning, templates and advice

<COMPANY OR PROJECT LOGO>

<PROJECT NAME>

<PROJECT REFERENCE>

PROJECT INITIATION DOCUMENT

VERSION <1.0>

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PROJECT INITIATION DOCUMENT

DOCUMENT CONTROL

DOCUMENT INFORMATION

	Information
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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			

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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>			

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TEMPLATE GUIDE

How to use this template

This is a guide to the common sections included in a [Project Initiation Document](#). Sections may be added, removed or amended to suit the project and project methodology. 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.

PROJECT INITIATION DOCUMENT

PROJECT SUMMARY

Provide an 'at a glance' summary of the project purpose. It should show how the project aligns with the [Business Strategy](#) or [Program Plan](#), which departments and technology will be involved and the key activities that will be performed.

PURPOSE

Explain why the project is being carried out – the rationale for the project. Aim to answer these questions:

- Why is the project being undertaken?
- What are the key deliverables?
- What is the planned [ROI](#) (high-level)? This can link to the [Business Case](#).
- What are the key touch points?

This section is usually concise. If a Project Brief has been completed, it should provide the key information for this section.

PROJECT OBJECTIVES

This section identifies the key project objectives – what specifically will this project achieve? It should clearly link to the Program Objectives. It is likely to include active verbs such as replace, revise, provide, secure, create etc. It will reference [Business Case](#), which is usually a separate document.

SCOPE AND EXCLUSIONS

Describe the main work streams, [work packages](#) and products that will be delivered. This section could include a high-level Work Breakdown Structure (WBS) presented as a graphical hierarchy or as a list with a hierarchy denoted by numbering. For example:

Get a template for a graphical [Work Breakdown Structure](#)

Get a template for a [Work Breakdown Structure in Excel](#)

PROJECT DELIVERABLES

Provide a complete list of the deliverables/products the project will produce. Make sure each deliverable has a unique identifier. This section may include links or references to each products [Product Description](#).

Deliverable ID	Deliverable Title	Deliverable Description

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INTERFACES AND DEPENDENCIES

Note any other groups, projects and organisations that will be involved in the project or will be impacted by the project. Include any dependencies here, for example if the project is dependent on an external product or an external decision.

Interface or dependency with:	Description	Management plan
Recruitment team	Recruitment of project manager by x date	Keys tasks documented in project plan with owners assigned. Job description already in place.

See [example job descriptions for project managers](#)

ASSUMPTIONS

List the assumptions that have been made in order to conceive of and plan this project. For example assumptions may have been made around legislation, other projects, market conditions, recruitment etc.

ACCEPTANCE CRITERIA

Describe in measurable terms the criteria that Project Sponsor will use to evaluate and accept or reject the project deliverables and outputs. This might include conditions that are not related to products like delivery by a certain date.

MONITORING AND EVALUATION

Document how the project will be monitored and evaluated. For example:

- How feedback will be collected on the value of this project by users of the products.
- The monitoring and evaluation methods the Project Sponsor will use to determine that the project has been delivered to specification and has had the intended impact
- The time scales and key dates for collecting the above information
- How, when and to whom the feedback and the monitoring and evaluation findings will be reported.

PROJECT DELIVERY

INITIAL RISK LOG

List the known risks to the successful delivery of the project. These should be specific to the project and not just a reiteration of common project risks.

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Helpful guides for this section: [A guide to Risk Management](#). Example [Risk Register](#). [Possible responses to risk](#).

Complete the following table:

Description	Likelihood	Impact	Mitigating Actions
<i>Inability to recruit skilled resource</i>	<i>Low</i>	<i>Very High</i>	<i>Involve retained recruitment consultant to source team members. Consider using consultants on fixed term contracts.</i>
<i>Technology solution is unable to deliver required results</i>	<i>Medium</i>	<i>High</i>	<i>Complete a pilot project against most business critical requirements. Consider using Agile methods to deliver working product in Sprints.</i>
<i>Additional capital expenditure may be required in addition to that approved</i>	<i>Medium</i>	<i>Medium</i>	<i>Monitor project spend as per the project methodology. Report on spend bi-weekly to the project board. Assign PMO Director to support Project Manager in cost control.</i>

PROJECT ORGANISATION STRUCTURE

In this section include an organization chart for the project. It won't necessarily show line management responsibilities, rather reporting and communication lines for the project. Include the key roles and responsibilities in this section and a [RACI](#) if applicable.

COMMUNICATION PLAN

To realise the business benefits a communication strategy will be needed, be that for internal staff impacted by the change or for external parties.

Set out how information about the project will be communicated. For example how will the project communicate progress, escalations, readiness plans for go live etc. There may need to be separate plans for internal and external communications.

INTERNAL PROJECT COMMUNICATION

Document the process, timings and governance of the planned internal communications. The table below may be helpful.

Description of communication	Timings e.g. monthly	Audience	Creator/author	Sign-off authority
<i>Project progress reports</i>	<i>Weekly</i>	<i>Project Sponsor, Risk Manager, Change Manager, project team</i>	<i>Project Manager</i>	<i>Program Manager</i>
<i>Highlight Reports</i>	<i>Monthly</i>	<i>Project Board</i>	<i>Project Manager</i>	<i>Program Manager</i>

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<i>Training plan</i>	<i>3 months prior to go live</i>	<i>Users and department managers</i>	<i>Change Manager & training manager</i>	<i>Project Sponsor</i>

EXTERNAL PROJECT COMMUNICATION

Document the process, timings and governance of the planned external communications. The table below may be helpful.

Description of communication	Timings e.g. monthly	Audience	Creator/author	Sign-off authority
<i>Marketing bulletin to existing customers</i>	<i>2 months prior to go live and at go live</i>	<i>Existing customers and their account managers</i>	<i>Marketing Manager</i>	<i>Project Sponsor, Marketing Director</i>
<i>New product pages on website</i>	<i>At go live</i>	<i>All website users</i>	<i>Marketing Manager web content</i>	<i>Project Sponsor, Marketing Director</i>

QUALITY MANAGEMENT

Two aspects of quality management should be considered within the PID: firstly securing high quality project management and secondly ensuring that deliverables are produced to agreed quality standards.

QUALITY MANAGEMENT OF THE PROJECT

For some projects quality of project delivery may be provided through pre-existing governance provided by program, portfolio management or a project management office. In these cases this section may just require a reference to pre-existing policies and procedures.

Example text:

Responsibility for checking that all procedures have been correctly followed in preparing this PID rests with: [Insert Name] Senior Project Manager.

Responsibility for checking and signing off this PID and for ensuring it follows the PID guidance rests with: [Insert Name] Program Manager.

Responsibility for ongoing monitoring and supervision to ensure that ongoing project management complies with the agreed procedures and processes rests with [Insert Name] of the Programme Office

QUALITY MANAGEMENT OF THE DELIVERABLES

In this section document what the quality standards, quality assurance process and quality checking are for each project deliverable. A table similar to the below may be used.

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Deliverable ID and title	Quality standards	Quality assurance	Quality checking
0034 Web pages	<p>Follow existing branding specification.</p> <p>Meet Accessibility compliance guidelines</p> <p>Meet browser compatibility policy</p>	<p>Follow publishing review process.</p> <p>Pre-approved suppliers only.</p>	<p>Web change advisory board via unit test, user acceptance testing and go live testing.</p>

PROJECT MILESTONES

List the project milestones (key points in a project life cycle). They might be target dates that must be met or delivery of important work packages or markers of progress. This section will likely contain a table similar to the one below.

Milestone	Milestone target date
Project Kick off	Day month year
Design phase	Day month year to day month year
Build starts	
Start of User Acceptance Testing	

RESOURCE PLAN

This section lists the resources - people and machine that are required for the project. A description of all of the Roles and Responsibilities should be included along with the resources needed, their skill set, when they are needed, how long for and the associated costs. Get a Resource Planning Template.

PROJECT TOLERANCE AND EXCEPTION PROCESS

Document the agreed Project Tolerances and provide a brief confirmation of the Exception Procedure to be followed if there is a deviation from the approved plan that is forecast to exceed Tolerance. Refer also to the Change Control Process that will be followed for this project. See example cost and time tolerances.

APPENDIX

RECORD OF AMENDMENTS TO THE PID

Keep a record of the changes made to each version of the PID. This section may form part of the PID header/document information page, or an appendix.

DELIVERABLE / WORK PACKAGE SPECIFICATIONS

Include the specifications for the work packages and project deliverables. For example, a unique reference for each deliverable, title, purpose, composition, format, owner, quality criteria, location/storage.

Deliverable ID & Title	Purpose	Composition	Format & location	Owner	Quality criteria

FINANCIAL / BUDGET REQUIREMENTS

Document the budget, cost and revenue forecast and any payment milestones as appropriate for the project.

DETAILED SCHEDULES

Provide a detailed project schedule. For example, a Microsoft Project plan may be attached here or referenced in this section. Get ready made Microsoft Project Plans. This may also include detailed team plans and resource plans. Get a Resource plan Template.

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.