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Project Management, project planning, templates and advice

<COMPANY OR PROJECT LOGO>

<PROJECT NAME>

PROJECT BRIEF

VERSION <1.0>

<DD/MM/YYYY>



Notes to the Author

[This Project Brief template includes instructions to the author, boilerplate text, and sections that should be replaced with the values specific to the project.]

- *Blue italicized text enclosed in square brackets [text] provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.*
- *Blue italicized text enclosed in angle brackets <text> indicates a field that should be replaced with information specific to a particular project.*
- *Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing project documents; they are not mandatory formats.*

When using this template, the following steps are suggested:

1. *Replace all text enclosed in angle brackets (e.g., <Project Name>) with the correct field document values. These angle brackets appear in both the body of the document and in headers and footers.*
2. *Modify boilerplate text as appropriate for your project.*
3. *To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Normal.*
4. *To update the Table of Contents, right-click on it and select "Update field" and choose the option - "Update entire table".*
5. *Before submission of the first draft of this document, delete this instruction section "Notes to the Author" and all instructions to the author throughout the entire document.*



PROJECT/PROGRAM DETAILS

Project/Program Name			
Sponsor / Senior Executive			
Project/Program Manager			
Start Date		Completion Date	

DOCUMENT DETAILS

Version	Status (Draft or Approved)	Date	Author/Editor	Details of changes

[Version numbering should start at 0.1 then 0.2, 0.3 etc when amendments are being made to a draft document and the status should be draft. Once issued the version should be 1.0, then 1.1 with amendments and the status should be approved.]



PURPOSE AND OVERVIEW OF THE PROJECT BRIEF

[The [Project Brief](#) is a key document in the [Project Lifecycle](#). It provides a description of what the project is to do and is a refined and extended version of the [Project Mandate](#). It forms the basis of the [Project Initiation Document \(PID\)](#).]

This is the [Project Brief](#) for <project name>, it gives the direction and scope of the project and forms the contract between the [Project Management Team](#) and the [project board](#). Any changes that are made in the Project Brief will need to be referred back to the [project board](#).

BACKGROUND TO THE PROPOSED WORK

[Background – describe the potential change, idea, and problem. Where it fits into the wider business context. Why it should be done now and the implications of not doing it.]

Describe the potential change, idea or problem and the circumstances, decisions, previous work that has lead to this [PID](#) being produced. This should make it clear:

- *what is the overall purpose of this project?*
- *what previous actions/decisions lead to the current position?*
- *why it needs to be done?*
- *why it should be done now?*
- *what the end result of this project should be?*
- *what are the implications are of not doing it?]*

OBJECTIVES

[[Objectives](#) should provide a clear definition of what the project must achieve in order to be complete and successful. This section might start "Completion of this project will result in....."]

[Objectives](#) should be [SMART – specific, measurable, achievable, relevant and time-bound](#). Avoid words like improve, optimise, clarify, help etc. These are vague words that mean you cannot measure your result. Project objectives should contribute towards and be consistent with higher level program and/or [business case](#) objectives.

- *How does the purpose of the project break down into specific [objectives](#)?*
- *What specific, measurable results are expected at the end of the project?*
- *The objectives will be used to measure the completeness and success of the project.]*



SCOPE

[The [Scope](#) should make it clear what are the boundaries of the work, what areas of work will be included and what is outside the scope. Where work could or should be divided into phases, a definition of [scope](#) for each phase should be given.

The [scope](#) may defined in terms of such things as:

- *the boundary between this project and other projects and program – this helps prevent gaps or overlaps in all the work that is necessary to achieve higher-level corporate or program objectives.*
- *the work that the project must do, and what it is specifically excluded from doing (you might refer to the list of deliverables if you feel it is complete at this stage).*
- *the geographic spread of impact.*
- *the coverage in terms the organisation(s) and types of role/staff/people/organisations that will be affected by changes arising from the project.*
- *The [scope](#) should be sufficiently detailed to form a measurable baseline for subsequent change control so that the damaging effects of [Scope creep](#) can be minimised.*
- *Be specific about what is excluded from this project to avoid any misunderstandings later on.]*

[N.B. there is a risk in using 'exclusion lists' in project documentation particularly contractual documentation. These lists can be mischievously used to claim that an item should be in scope - the "well it isn't on the exclusion list" argument. If you do use an exclusion list, use it to draw out additional assumptions and to check understanding. Make sure it is very clear that the list is not exhaustive.]

DELIVERABLES

[[Deliverables](#) are the main component parts or outputs of the potential project that have to be produced in order to achieve the project objectives. [Deliverables](#) should be tangible and might include things such as reports, consultation documents, submissions, software/IT systems, trained staff, documents, contracts, accommodation and marketing material.

A simple list may suffice, or you might or you may find it useful to use the [Work Breakdown Structure](#) to help you identify the main deliverables and the products that form the building blocks needed to produce them.

The table below may be helpful.]



Unique ID / WBS ref	Deliverable title	Deliverable description

BUSINESS BENEFITS

[What are the desired [benefits](#) to be gained from undertaking this project? Are they tangible/intangible quantifiable/unquantifiable? Who are the beneficiaries? If possible give a value, and suggest a timing for realisation of each [benefit](#).

The information about the desired benefits that will be expected to be achieved and/or enabled by the project.

The [benefits](#) should be defined in sufficiently precise and measurable terms for the Project Sponsor/[Project Board](#) to decide whether or not it is justified to authorise the project to start and hence to commit project management resources to plan the project in detail.]

ASSUMPTIONS

[This should be an explanation of factors that you are assuming to be in place, or to occur in the life of the potential project, that will contribute to a successful outcome. At this stage you might have to make assumptions about such things availability of funds and other resources and about decisions being made in external bodies.]

CONSTRAINTS

[[Constraints](#) are things that can't be changed. They are existing conditions that you must take into consideration during the project and may include such things as deadlines, standards, regulatory requirements, a major [dependency](#) on another project and [resource constraints](#).]



RISKS

[Risks – from your current knowledge explain any areas of uncertainty that represent threats to achievement of the desired outcome, or opportunities that might otherwise be missed. These must be significant enough to help inform the [Project Sponsor/Project Board](#) decision whether or not to approve the project to proceed.]

A summary of any known threats (and opportunities) facing the project. The detail should of risks and management actions should be held in a [Risk Register](#) (see separate template).]

OTHER AREAS OF BUSINESS AFFECTED

[Are there other areas of the organisation and/or its customers/partners that could be affected by the outcome of the potential project?

Try to identify ownership of each area and whether they need to be involved right from the start.]

A list of known areas that will be impacted by the project.

MAJOR DEPENDENCIES

[[Dependencies](#) – are there any events or work that are either dependent on the outcome of this project or that the project will depend on. Identify ownership and start thinking about how best to manage these during the project. Where there is uncertainty about the likelihood of delivery of an external dependency it should be treated as a risk.]

A description of any known dependencies with other projects, program or initiatives which may be internal or external to the parent organisation. This may be defined in terms of such things as products/deliverables, resources, decisions, legislation, environmental conditions, economic conditions etc.]

STAKEHOLDERS

[A stakeholder is anybody who can affect or is affected by an organisation, strategy or project. They can be internal or external and they can be at senior or junior levels.]

For larger or more complex projects you may wish to construct a Stakeholder Map by [identifying the stakeholders](#) and then analyzing them using the [power vs interest matrix](#) or the [Stakeholder Salience](#) model.]

For guidance on how to identify and analyse stakeholders see [Stakeholder Definition](#) and [Stakeholder Analysis](#).]



STAFF RESOURCES

[Resources – give an initial assessment of the amount of resources you need to complete this programme or project. Think about the skills and experience that will be required and when you will need these. This will help identify any gaps once the project is underway and identify the stakeholders you will need to approach to agree resource allocations.

Initial estimates for the staff resources types and amount of effort required to complete the project. This should cover not only specialist skills related to the work to be done but also the project management resources.]

OUTLINE ESTIMATES OF TIME AND COST

[Costs – Provide your best estimate of likely cost of completing this project based on how long do you think this work is going to take and the resources (internal and external) that you will use?

These costs will be revalidated as you progress through your project but should be robust enough at this stage to ensure it is worth continuing with the project.

Initial estimates for financial commitments and for timing of [key milestones](#) and expenditure to enable the [Project Sponsor](#) / [Project Board](#) to decide whether the project is viable.]

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