

Project Definition Worksheet

Read these instructions and then delete This Whole Section

File: PROJECT DEFINITION WORKSHEET.DOC

Template Change History

Date	Version	Author	Changes Applied
01 Jan. 2000	1.00	S. Harrison	Initial version
01 Dec. 2001	1.01	S. Harrison	Updates and clarifications to definitions of section contents

When To Use

The Project Definition Worksheet is used at the very start of the project as an information-gathering tool. The worksheet prompts for information that is required to start understanding and scoping the project. Much of its contents can be copied and pasted into other documents that are used in the project life cycle. This worksheet is a working document, not a formal report for general circulation, except for information gathering purposes.

General Instructions

- Work through the template and remove sections that are not appropriate for your project requirements.
- Replace italicised prompts with the required information
- Change all variables as listed and defined in the "Variable Names to Change" section below to the relevant name in the document using the search/replace function
- Delete this **Document Change History** section

Specific Instructions

Fill out the worksheet until there is sufficient information to complete the scope statement. The scope statement, when complete, can be copied and pasted into other documents.

Variable Names to Change

The following variable names exist in the document and need to be changed when creating the new document. They are all in CAPITALS and are surrounded by “[” and “]”. Search on the brackets with the Variable Name text enclosed:

Variable Name	Use
ORGANISATION	Name of organisation the report/document was prepared for.
PROJECT	Name of project
VERSION ID	Version number for this iteration of the document
DATE	Date the document is completed for circulation — not appropriate for documents that represent logs or other documents where there is no versioning cycle.

Template Contact

Direct queries on other templates and the associated HIway methodology to:

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Project Definition Worksheet

This document is not intended for reporting or management review. It provides a guide on what data to gather to initiate the project and focus on the important issues.

Administration

Project Name:	
Author:	
Sponsor:	
Revision:	
Printed:	9-May-06

Project Goal

Describe what the project will achieve. The goal is broad, flexible and attuned to the strategic plan. It should be decomposable into incremental and measurable targets or objectives. This should be a short, precise statement of what the ultimate business outcome of the project is to be.

Project Context

Describe the current environment that the project is amending or replacing. Highlight the key factors that have resulted in the need for this proposed project. What is the business problem that needs addressing?

Project Justifications

Identify the strategic business and technical justifications for implementing the project. Why is this project important to the organisation? How, in what manner, or to what extent, will this project solve the business problem? Justifications are the reasons for performing the project. Examples include:

- System response times have dropped to unacceptably slow rates.*
- Costs for maintaining the current environment have grown to \$#,### per annum*
- For \$#,### we expect to deliver an improved environment with return in XXX months/years.*

Objectives

Identify factors that comprise the project objectives or success criteria by which the project will be judged. These will constitute measurable steps that must be accomplished to fulfil the project goal. They should include:

- *business purpose*
- *those things identified as “satisfactory” benefits by sponsor/client*
- *needs of owner, users and stakeholders*
- *prestated objectives for initiating the project*
- *meeting agreed time, cost and quality objectives*

Objectives should be written so they have:

- *Specific descriptions of what must be accomplished*
- *Measures that clearly identify accomplishment*
- *Agreement from key stakeholders*
- *Realism — they must be achievable within the time, cost and other constraints imposed by the project*
- *Time frame within which to be completed*

Objectives result in deliverables, milestone achievement, customer satisfaction, project control within specific constraints etc. Expect to see duplication of objectives in different forms across these sections.

Refer to “The Implementation Of Project Management: The Professionals Handbook”, p. 163-165 for discussion on establishing objectives.

Project Phases/Milestones

Describe the major phases and/or significant milestones of the project. Each phase should culminate in the production of at least one major deliverable (e.g. draft design, reservations programme, user documentation etc).

Milestones are clearly identifiable points that denote the completion of a large or important set of activities. Milestones are generally used for progress reporting, and may be points utilised in contracts for payment of fees. A phase often consists of a number of milestones.

Approach

Describe the broad approach or process that will be followed in implementing the project, performing the work and addressing issues/risks that are identified as significant.

Inclusions

The following areas are specifically included in the scope and must be delivered for the project to be considered successful:

-

Exclusions

The following areas are specifically excluded from the scope of our involvement in this project:

-

Deliverables

Identify the major deliverables that will result from implementing the project. Examples include:

- *Software application/system*
- *Documentation*
- *Establishment of help desk*
- *Feasibility study*
- *BPR document*
- *New service delivered to public*

Acceptance/Success Criteria

Identify what criteria will be used to judge the success or failure of the project. These tie to the objectives and success criteria, but are generally more specific and detailed. Examples of measurables include:

- *Completion date*
- *Project cost*
- *Person hours*

- *Performance measures*
- *End user acceptance*
- *Increased revenues*

Examples of how acceptance criteria may be formulated include:

- *Database performance will be a minimum of 20 [type] transactions per second*
- *The average time for getting an engineer on site when responding to an 'A' class hardware support call during the first 6 weeks of operation will be within X hours. At least five calls will be placed during the period, whether genuine or not in order to provide acceptance data.*
- *The [name] software module will perform for two weeks without any 'A' class errors and no more than N 'B' class errors.*

Project Personnel

Name	Role	Phone	Fax

Resource Requirements

Identify resource required for the project. For example:

- *Personnel — time, skill sets, levels*
- *Specific skill sets required*
- *Hardware*
- *Software*
- *Services*
- *Capital items*
- *Facilities*
- *Travel and accommodation costs*

Constraints

Constraints are factors that limit the way in which a project can be managed. Identify constraints imposed on the management of the project including, but not limited to:

- *Management Constraints*
 - *Budget*

- *Time*
- *Resource*
- *Scope*
- *Technical Constraints*
 - *Implementation*
 - *Security*
 - *Operational*
 - *Geographic*
 - *Equipment*
 - *Business processes*
 - *Physical facilities*
- *External Constraints*
 - *Government regulations*
 - *Industry regulations*

Assumptions

Identify those factors that have been accepted as real true for the purposes of planning but have not been tested or proven true. This is important because assumptions will provide the basis for the project management plan. If an assumption is later shown to be incorrect (due to changed environment or other factors) it becomes easier to adjust the management plan to cater for the change. Examples include:

- *System support requirements are for 8:30 am to 5:00 PM, Monday to Friday*
- *The operating system or database can be taken offline to perform backups and other maintenance.*
- *A minimum of three (3) programmers will be available full time during the testing process.*
- *The most important feature to the sponsor, in terms of urgency and full operational use, is ...*

As requirements are developed the assumptions should be confirmed and included in the requirements, or be identified as incorrect, and be deleted/replaced, and appropriate changes to the plan and associated documentation made.

Risks — Opportunities and Threats

*Identify major risks that may be encountered on initiating and through the life of the project. These should include both business risks, where opportunity for loss or gain exist, and pure risks, which only include potential loss. Refer to the **Risk Identification Checklist**, **Risk Event Worksheet**, and **Risk Management Guidelines**.*

Stakeholders

Identify project stakeholders — those who may influence or be influenced by the project. These will be internal to your organisation and other organisations with which the project interfaces, affects or relies on. Stakeholders may also be among external groups such as media, interest groups etc. Identifying stakeholders will assist in defining a communications plan.

Interrelated Projects

Identify projects that are related to proposed project. Consider interactions with other projects where this or the other project:

- *must be completed before the other commences (start-finish dependency)*
- *a task of one must be completed prior to task in other starting*
- *shares data sources such as databases, hardware or infrastructure, where one project may impact on the other*
- *impact on project environment of one project on another*
- *shares human resources and poses conflict situations*

Information Sources

Identify the sources of information used in developing the worksheet. Possible sources include:

- *Interviews*
 - *Sponsor/Customer management*
 - *End Users*
 - *Subject matter experts*
- *Documentation*
 - *Statement of work*

- *Requirements documents*
- *Specifications*
- *Memorandum*
- *Other sources*
 - *Media*
 - *Government statutes*
 - *Library resources*

Questions To Be Answered

Identify any questions or issues that need to be answered. Identify the expected source for the answers. These need answering in order to prepare thorough plans. Examples include:

- *Are there standards defined for performing function Y? [Function Y is a process that must be performed in the project and may be defined elsewhere in the organisation]*
- *What coding and documentation standards are defined and used within the organisation?*

In obtaining the answers constraints, assumptions, requirements for additional/less work, alternative/additional resource, different risk events and strategies may be identified.