

Defining a project

Central to defining a project are identifying the people, preparing a project brief and scope of works, gaining an understanding of the risks, and holding a kick-off meeting.

Identifying the people

Project manager

Project manager responsibilities may differ in particular situations but key aspects of a project manager's job are likely to include:

- ◆ Establishing project objectives and their approval
- ◆ Agreeing approval procedures with the stakeholders
- ◆ Preparing project plans and getting them approved
- ◆ Establishing monitoring systems
- ◆ Establishing the budget
- ◆ Tracking progress and producing regular status reports
- ◆ Resolving conflicts
- ◆ Managing the project team
- ◆ Ensuring problems are identified and corrected
- ◆ Ensuring decisions are made to achieve objectives
- ◆ Delivering the expected outcomes at each stage – on time and to budget

Project team

Availability is not everything! Most teams come together through negotiation with the individuals themselves and their line managers. The project manager is usually central to the selection process.

In the selection of the project team, consider:

- ◆ Subject-relevant experience and knowledge
- ◆ Previous experience in project teams



'Defining a project' gives you key pointers on identifying the people, preparing a brief, developing a scope of works statement, understanding the risks, and holding a kick-off meeting - all of which are vital for providing solid foundations for your project.

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- ◆ Other project and non-project workload that the individual is already committed to (although this itself can be renegotiated if an over-committed individual is an obvious addition to the project team)
 - ◆ Interest in the project. If an individual perceived that s/he would gain from being part of the project they will be more motivated to give their best
 - ◆ Organisation- and time-management skills
 - ◆ Likely contribution to team shape. The work of Meredith Belbin on team types could be used to identify the preferred team roles of possible project team members in order to ensure a mix of types
 - ◆ Their line manager's view of this project

Project sponsor

The project sponsor for a particular project may be immediately obvious to all involved but, at times, will require identification by the project manager. The project sponsor is the person accountable for the project's outcome, and it is their role to:

- ◆ Describe the problem that the project has been created to address
- ◆ Define the purpose of the project
- ◆ Spell out the benefits to the business of deriving a solution
- ◆ Defining the results to be achieved
- ◆ Identifying the project objectives
- ◆ Setting the deadlines for the results

Other stakeholders

There are usually many stakeholders with an interest in a project. Pause to ask:

- ◆ Who are the stakeholders?
- ◆ Are they internal or external?
- ◆ Are they central to the project or not?

Identify the manager, the team, the sponsor, and the other stakeholders

Important stakeholders who are sometimes forgotten in the project definition process are the customer and the end users! While this may seem incredible, it is the complexity of identifying who the customer and end users are on a particular project which causes many project managers to 'forget' to address this issue!

Projects may have *multiple* customers and end-users, and these need identifying and managing.

Preparing a brief

The benefits of preparing a project brief include:

- ◆ An opportunity to involve the project team at the start of the project if the members of that team are known at this point
- ◆ It is a document that may bring previously unresolved issues to the fore for resolution. This is often the case where the project sponsor is unclear
- ◆ It is a document that the project sponsor approves – this provides support for the project manager as well as clarity
- ◆ Projects are frequently complex and their objectives may even be altered when they are in motion. In this instance, the initial project brief is valuable in 'time-stamping' the project definition, and explaining why certain decisions may have been taken at that time
- ◆ The completion and distribution of the brief helps to define the project manager's authority

The project brief is a document that summarises relevant information about a project, including the overall objectives, the deliverables, benefits, and approach. Completing a project brief is vital in ensuring the project is defined enough to commence planning. It forces clarity of thinking.

*A project brief
forces clarity of
thinking*

Developing a scope of work statement

In addition to the brief, in the project definition phase there is value in thinking through the scope of the project in more detail. Certainly, the brief contains a statement of the overall objective of the project. However, this needs unpacking and developing into a scope of work statement. Ideally, this is prepared and distributed with the project brief as the Project Sponsor's sign-off on the scope of work is vital.

The scope of work statement needs to cover the following:

- ◆ Detail on each deliverable and benefit
- ◆ Boundary limits of the project, i.e. what is *not* going to be done
- ◆ Constraints: financial, time, quality
- ◆ Assumptions
- ◆ Standards
- ◆ Specifications

Few projects have enough resources to avoid prioritising requirements. MOSCOW is a useful way of thinking about this:

Moscow:

Must have day one

Should have but could be phased in

Could have if there's time and budget

Won't have

Understanding the risks

At this early stage in the project, a shared understanding of the key areas of risk and the overall level of risk is valuable.

A risk analysis should form part of the project definition and risk will become a key area for on-going monitoring. If you would like a simple risk assessment that you can amend for your particular project, email us and we'll send you one. Alternatively risk analysis works well as a team exercise:

Risks need to be identified but also then monitored

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- ◆ Brainstorm risks
 - ◆ Rank risks against probability and impact on project
 - ◆ Identify low, medium and high risks

Where a project has high-risk elements, some further work is often needed to determine how to reduce the risk and these could include:

- ◆ Training
- ◆ Team-building
- ◆ Presentation and buy-in strategies
- ◆ Re-negotiation of project scope
- ◆ Use of outside (experienced) resources

Risks to the project may change over time. This means that there is a need for a system to monitor risks throughout the project. At this early stage in the project, you can do the following to begin to control risks:

- ◆ Allocate responsibilities for monitoring each risk identified, including for any change of ranking
- ◆ Monitor and report on actions agreed to help reduce risks identified

*If anything can go wrong, it will.
Murphy's Law*

Holding a kick-off meeting

As part of the project definition, a kick-off meeting is helpful for gathering information and developing a shared understanding.