Handbook

Project Overview

Version 3.0

Revision History

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| --- | --- | --- | --- |
| **Date** | **Version** | **Description** | **Author** |
| 26 February 2014 | 1.0 | First issue team charter | XBMS Manager |
| 05 August 2019 | 2.0 | Second issue project charter | XBMS Manager |
| 10 March 2020 | 3.0 | Third issue project overview | XBMS Manager |
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Project Overview

# Introduction

## Purpose

The purpose of this handbook is to provide guidance for the development of a project overview.

The handbook is relevant to all teams in the organisation and therefore is relevant to all personnel.

## Scope

This handbook is focused on the development and use of a project overview; other aspects of project operations are not within its scope. The formation and operation of teams is covered in the team charter template (see Wattle).

## Definitions, Acronyms, and Abbreviations

Charter A guide that serves to focus and motivate a team in its pursuit of its goals and objectives

# Overview and Rationale

Multiple reasons exist for preparing a project overview. The Project Overview is usually the first document developed to introduce a project.

It expands the initial concept or idea to broadly define the scope of the proposed project, generally only required for small to medium projects. Larger, more complex projects may require a more formal, structured approach to initiation, often requiring a separate body of work (phase) to investigate and develop the business case, and also often involving a Project Business Plan for its initiation phase.

A Project Overview is developed to outline the proposed approach to achieving the desired outcomes. It provides an opportunity to obtain feedback on underlying concepts for the project. It should provide sufficient information for a decision to be made as to whether or not the proposed project should proceed to the next step of further empathy then ideation.

A Project Overview therefore begins the formal communications between yourself and your client, a dialogue that will continue for the length of the project. The overview is also your first step at coordinating all the elements of your potential project. In other words, you are beginning to structure what the project will look like when it’s up and running. Your early focus on goals and objectives is what creates success later. It is used early in the Project Life Cycle to describe the project vision, timeframes and deliverables so that everyone is on the same page, knowing what has to be done and by when.

As part of the project overview the team needs to record the team’s purpose and clearly define individual roles, responsibilities, and operating rules. It establishes procedures for both the team and agency management on communicating, reporting, and decision-making procedures. It lays out a blueprint for conducting business and defines how the team works in an empowered manner, including setting out responsibility and authority. Finally, it enables a shared understanding of how the team will work.

# Content of a Project Overview

This section can be used as a template for your project overview. Update or delete sections and include this document on your repository; otherwise, use relevant headings to design a page on your repository for the project overview.

**Project Summary**

**Project Purpose**

Provide a statement about the purpose of this document. For example: “to obtain feedback and/or to secure a decision to proceed with the proposed project”.

**Project Challenge**

Include a brief description of the project challenge and what the project will achieve according to your team’s understanding.

**Point of View**

Outline your design challenge into an actionable problem statement using a Point of View (POV) framework.

**Project Client**

Include a brief description of your client (refer also to the PCM):

* Begin with introducing the company name, the client name, position, and experience, etc
* Why is the client interested in this challenge (personal/organisation level)?
* What is their current operation of business?

**Working title for the proposed project**

The working title is an interim title. It may change once the project is approved. Include both the abbreviation and long title.

The working title for the project is the <Project Title> Project.

**Project Schedule**

Outline the expected timeframe for delivery of the project.

For example: The project is expected to commence on <dd/mm/yy> and be completed by <dd/mm/yy>.

**Project Overview**

**Key stakeholders**

This section should outline the key stakeholders relevant to the project and with whom the project team should liaise more closely over the project term.

**Challenge Assessment**

* What are the key words in the project challenge? Evaluate the most recent articles and news in the field related to these key words, themes, topics or concepts.
* What are the recent innovations that relate to your project challenge? They could be technological, behavioural, or cultural. What is the edge needed for your research or solution?
* Take a look at other solutions relating to your project challenge. Which ones worked? Which ones didn’t? Are there any that feel similar to what you propose to investigate as part of the research design? Any solutions that have inspired you to possibly use or adapt?

**Situation assessment**

This section should clearly scope the business and environmental factors influencing the proposed project. Additional information may be included as Appendices.

* Include a description of the relevant environmental conditions affecting the client business, including relevant statistics, trends, competitors, etc (macro level)
* Who is the client base? Outline the trends, relevant statistics and information relevant to the project. (micro level)
* Assess how the business needs in relation to the project challenge are currently being met (strengths) or not met (weaknesses). What can be improved?
* Analysis of the gap between the current situation and the stated objective(s). What opportunities does this create?

**Consultation**

Provide a summary of any proposed or actual consultation, tools or other approaches undertaken with stakeholders to communicate the project and their respective levels of support for the concept as part of the empathy stage. Initial negative support may indicate increased risk for the proposed project.

**Proposed Scope**

Based on the information outlined above, begin to scope the project and describe how the project will be managed. The information in the following sub-sections are important, as they will form the basis of a Project Business Plan if the project recommendation/innovation is developed.

Table <n>: <Project> Proposed Scope

|  |  |
| --- | --- |
| **Element** | **Detail** |
| POV | See section above of this template |
| Outcome | You may not be able to identify and specify target outcomes for the proposed project at this point. The broad business outcomes should be specified as a minimum. |
| Output | Outputs are the products, services, business or management practices that will be required (produced) to meet the identified outcomes. |
| Quality Criteria | What criteria will be used to judge whether outputs are fit-for-purpose. Link description here to tables below as needed. |
| Customer(s) | The person or entities that will utilise the project outputs to generate the outcomes |

User requirements for the <Project title> project have been sourced from <add details>. User requirements identified to date are detailed in Table <n> below.

**Table <n>: <Project> User requirements**

Adjust the rows and columns below to outline the initial user requirements identified for your project challenge. Additional information may be included as Appendices.

|  |  |  |
| --- | --- | --- |
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|  |  |  |

Technical requirements for the <Project title> project have been sourced from <add details>. Technical requirements identified to date are detailed in Table <n> below.

**Table <n>: <Project> Technical requirements**

Adjust the rows and columns below to outline the initial technical requirements identified for your project challenge.Additional information may be included as Appendices.

|  |  |  |
| --- | --- | --- |
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## Assumptions

It is essential that assumptions made during the planning process are recognised and recorded, for example resource availability, environment, technology, security etc.

The main assumptions are:

## Constraints

Constraints are known limitations within which the project must work, for example deadlines, finance and budget, legislation etc.

The main constraints are:

**Risk Assessment**

Risks are known or unknown factors affecting the project, for example potential costs, resources, timelines that may not be met or delivered upon (see more here, https://www.pmi.org/learning/library/risk-analysis-project-management-7070).

Risk assessment for the <Project title> project are detailed in Table <n> below.

**Table <n>: <Project> Risk assessment**

|  |  |  |
| --- | --- | --- |
| Identified risk event | Risk probability | Risk impact |
|  |  |  |
|  |  |  |

**Proposed Budget**

Proposed budget for the <Project title> project are detailed in Table <n> below.

**Table <n>: <Project> Proposed budget**

|  |  |  |  |
| --- | --- | --- | --- |
| Expense | Budget category | Budget | Actual |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Project Milestones**

Include the project milestones as subheadings or table which outlines:

* a set of goals and deliverables for each audit (2-3 sentences)
* contingencies, such as stretch or crash goals for the milestone (2-3 sentences)
* a timeline for the project to reach the milestone (weekly table)
* a work breakdown structure for the milestone (as designed) – performance criteria with descriptors.

**Sign Off:**

I have participated in the development or review of this project overview and agree to it.

Team Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Industry party: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Seminar tutor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: