Use this document to complete **Revision activity 1** in **Revision task 1, Unit 3**. A copy of this document also appears in your Workbook.

Project Initiation Document

Project details

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| --- | --- |
| Project title | Training Recording system |
| Project sponsor name | Mike Glaslyn |
| Client name | Kirsty Glaslyn |
| Project manager name | Husnain Ahmed |
| Start date | 29th august |
| Completion date | 31st august (3 days of work) |
| Estimated cost | £80,000 |

Document details

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| --- | --- | --- | --- |
| Version | Modifications | Author | Date |
| 1 | No changes | Mike Glaslyn |  |
| 2 | Additional cost of £600 | Kirsty Glaslyn | 12th july |
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Document approvals

This document requires the following approvals:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Role | Signature | Date | Version |
| Mike Glaslyn | Project Sponsor | M.G | July | 2 |
| Kirsty Glaslyn | Client | K.G | July | 2 |

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| Name | Role | Date of issue | Version |
| Mike Glaslyn | Project Sponsor | July | 2 |
| Kirsty Glaslyn | Client | July | 2 |
| Samira Khan | Software team manager | July | 2 |
| Wayne Applewood | Training manager | July | 2 |

Purpose of the Project Initiation Document

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| **Project aims:**   * Implement system for training in courses for first aid, fire safety training, health and safety, food hygiene to businesses organisations and individuals. * It should include 6 modules: course schedule module interface with business logic, Payment module, Trainer/Assessor module, Venue module, Client services module, Reporting module. * Produce diary / events schedule * Generate invoices * Allow customers to update their details * Save money * Show course availability * Search/book/pay for courses |
| **Project management and control:**  Identify quality control and assurance  ISO 25010 to test system  Acceptance testing for quality and review  Need a training manager to train staff and a software teem manager to manage systems installation technicians from the server contractor |
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Background to the proposed work

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| Drivers / drawbacks of existing system : The company does not have the required systems for people to search and pay for courses and they need to rent them.  Manual systems are time consuming and not accurate.  All systems need to be integrated and automated |

Objectives

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| --- | --- | --- |
| SMART Objective | Achieved? | Date and comments |
| * increase course occupancy to at least 95 percent within the first six months | yes | Project started successfully |
| * improve client satisfaction to 90 percent | yes | Customers were satisfied |
| * reduce administrative costs by 10 percent within the next three months | yes | Costs were reduced by 15% in 2 months |
| The project should begin on 1 August | yes | Project started successfully on the 1st of august |
| launch on 1 September when the training company re-opens for business. | yes | Project launched successfully on the 1st of September |
| On 29 August the direct system implementation will begin for the Training Recording System. | yes | System implemented successfully |
| The allocated budget for this project is £80 000 | yes | Budget was granted |
| The Finance Director expects a return of at least £1500 at the end of one year | no | Return of £1000 at the end of the year |
| Expect an increase in course sales revenue of at least 20 per cent. | no | Increase in revenue by 15% in 1 year |

Scope

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| Consumers can pay for their courses online, they should have a online schedule for their lesson timetable, they should be able to update their details online.  This is only the first phase so the actual online course does not need to be covered. |

Business case

The business case was prepared by the Finance Director.

The current system will not support the training resource system requirements.

There are two options:

1. buy a ready-made product and install and maintain it using existing internal staff
2. design and build a system using external skilled staff and subcontract support to an external computer system support company

It has been agreed that option 2 is the preferred method.

The expected business benefit of the project is a measurable improvement in course sales, customer satisfaction and an integrated system that will reduce errors.

The new system is expected to:

* increase course occupancy to at least 95 per cent within the first six months
* improve client satisfaction to 90 per cent
* reduce administrative costs by 10 per cent within the next three months
* improve accuracy as a result of automated processes
* improve the Training Manager’s reporting on course occupancy
* show Trainer/Assessors’ availability in the electronic diary.

**Timescale:** The project should begin on 1 August and launch on 1 September when the training company re-opens for business.

On 29 August the direct system implementation will begin for the Training Recording System.

The allocated budget for this project is £80 000 and the Finance Director expects a return of at least £1500 at the end of one year and an increase in course sales revenue of at least 20 per cent.

The Finance Director has identified the following major risks:

* retraining of staff to enable them to use the new integrated system efficiently
* lack of in-house technical expertise to maintain the system
* legal issues relating to security of Trainer/Assessor and client data
* budget constraints
* current hardware not capable of processing all of the data
* the lack of a contingency plan
* ongoing support costs.

Assumptions

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| --- | --- | --- | --- |
| Assumption | Validated by | Status | Comments |
| The hardware that we have access to is capable of processing all the data | Software team manager | confirmed | Ensure that it can run the software by asking the software team manager what the minimum specs he needs are |
| Costs will stay the same throughout the project life cycle | client | marginal | Client doesn’t add more things which cost more |
| Equipment is all in working order and will not be damaged or become faulty whilst in use | Software team manager | open | Try not to break anything |
| Employees will have the assets needed to carry out their assignments on time | Project manager | confirmed | this includes specialized hardware and programmes down to power amid working hours. |
| The scope of the project (as a whole) will not change once the project has begun | client | open | Client doesn’t add more things which cost more |

Constraints

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| --- | --- | --- | --- |
| Constraint | Validated  by | Status | Comments |
| * budget constraints | Project sponsor | critical | A set amount of money to spend |
| * current hardware not capable of processing all of the data | Server contractor | critical | Implement good enough computers to run the software without issues |
| * lack of in-house technical expertise to maintain the system | Training manager | critical | Train people to be capable of doing their job |
| * ongoing support costs. | Project sponsor | critical | Pay enough to finish the project |
| * retraining of staff to enable them to use the new integrated system efficiently | Training manager | critical | Train people to be capable of doing their job |
| * ISO 25010 Is used to test the software's standards | Software team | marginal | This is used to make sure that the quality of the system is good |

Risk management strategy

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| Risk | Probability | Impact | Severity | Contingency plan |
| * the lack of a contingency plan | low | high | critical | Make a contingency plan |
| The employees that are working on the project may not be able to meet the client's needs | low | high | critical | Retrain the staff before undertaking a large project |
| If employees are ill and cannot do their work | medium | high | critical | Work from home via remote desktop |
| If any work equipment fails | low | high | critical | Have backup computers to use |
| Deadlines not being met by the project team | low | high | critical | Enforce deadlines harder |
| Going over the budget limitations and not being able to pay for the project | low | high | critical | Don’t do it |

Deliverables

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| Item | Components | Description |
| Online training system | Training event diary | Link to the trainer/ assessor and the invoice system and course diaries |
| Training events diary | Trainer diary | A diary of all the training events, details, venue details |
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Project quality strategy

Stakeholders

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| Stakeholder | Responsibility |
| Managing director | Control of finance, maintains priority of project in the company, provides authority and guidance |
| Project manager | Responsible for planning, defining, controlling and leadership |
| Finance director | Client who provides product requirements and project finance |
| Software team manager | Responsible for following company policies |
| Server contractor | Supplies materials and contributes specialist work |
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Project management team structure



Communication plan

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| Stakeholder(s) | Frequency | Type | Purpose |
| Managing director | weekly | Email informing them of the status of the project | Keep him informed of progress to date |
| Finance director | weekly | Risk assessments, project checkpoint and work tolerance reports.  Email reports | Keep him informed of progress to date |
| Software team manager | daily | Delivery schedule updates  Testing process update  Email updates | Keep him informed of progress of the testing process |
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