

Defining Project

Importance of Defining a Project Correctly

- It builds the foundation for all other project management activities.
- It sets the stage for eventual project success (or failure).

How to Define a Project

Ask the basic project definition questions:

- Why are we doing this? (Purpose)
- What organizational-level goal(s) does this project support? (Goals and Objectives)
- How does this project fit with the other projects that are going on? (Scope, Project Context, Project Dependencies)
- What is the expected benefit from this project? (Expected Benefits, Business Case, Value, Success Criteria)
- What are we going to do? (Scope)
- Who is affected by this and who must be involved? (Stakeholders)
- How will we know when we are done and whether the project was successful? (Success Criteria)

How Does Defining a Project Relate to Project Planning?

- Project definition is the first step of project planning. However, it is also important to make the distinction between the two for several reasons:
 - Logistically, need to know the parameters and boundaries for the project before developing a detailed and complete project plan.
 - Politically, need to know the key stakeholders are in agreement with the project mission (project purpose, goals, objectives, and success criteria) before proceeding.
 - Practically, the work to properly define a project is often not trivial.
 - Historically, people have learned that detailed project planning and general project management are inefficient, and difficult at best, if project definition is not performed.
 - Financially, effective execution of the project definition process enables the organization to better invest its limited resources in initiatives that offer the greatest return.

Project Definition Document

Required elements

- Purpose—This section should answer the “Why?” question and clearly communicate the expected business value. It should reference the organizational objective being supported, the business problem being solved, and its relative priority level.
- Goals and Objectives—This section is derived from the Purpose and communicates the targeted outcomes for the project. It should answer the “What are you going to accomplish?” question.
- Success Criteria—Closely related to Goals and Objectives, this section should list the measurable, verifiable results that determine the success level of this project. This section is often referred to as Critical Success Factors.
- Project Context—Documents how this project relates to other projects within the product program and within the organization as a whole. This section should also describe how the project fits within the organization and business process flow.

Project Definition Document

More required elements

- **Project Dependencies**—Closely related to Project Context, this section clearly documents any dependencies that could affect the results or success factors of this project.
- **Scope Specifications**—Clearly designates the organizational, process, systems, and functional specification boundaries for the project. This section should be a high-level breakdown of the Goals and Objectives.
- **Out-of-Scope Specifications**—Clearly indicates the high-level work items that are related (or associated) to this initiative but that are not part of this project to better communicate what is considered to be in scope.
- **Assumptions**—Clearly communicates the underlying basis or things to be considered true in regard to any other aspect of this document. In most cases, the Scope, Out-of-Scope, Assumptions, and Constraints sections combine to clearly define what work will be performed by this project.

Project Definition Document

More required elements

- Constraints—Lists any business event, schedule, budgetary, resource, or technical factor that will limit the options available to the project.
- Risks—Lists any uncertain event or condition (risk) that, if it occurs, could have a negative effect on one or more project success criteria (schedule, budget, quality, and so on). For each risk, it is good to list the related causes, the perceived negative effects, the likelihood it will occur, and the planned response strategy and action items.
- Stakeholders—Lists all the individuals, business units, and organizations involved in the project, the role(s) each is expected to play, and an indication of how they relate to one another. A Project Organization chart and a Stakeholder-Role Description Table is highly recommended here.
- Recommended Project Approach—Highlights the recommended approach to getting the work of the project done and why it is selected over any other options as a way to better describe the intent of the initiative. This section should note any key strategies, methodologies, and technologies to be used.

Project Definition Document

Optional elements to consider

- Alternative Project Approaches
- Organizational Change Issues
- Policies and Standards
- Preliminary Cost, Schedule, and Resource Estimates
- References to Supporting Documents
- Visual Scope Summary

Project Definition Checklist

Possible corrective actions

- Resolve any gaps with appropriate stakeholders before moving on to the next phase.
- If the project has already been defined, work to resolve these gaps during the detail planning phase.
- If gaps cannot be resolved, then handle as project risks or issues (whichever is appropriate for the specific gap).

Project Definition Checklist

Categories

- General
- Scope
- Stakeholders
- Project approach
- Other
- Acceptance

