

Initiation: Guiding questions and tips

The initiation phase is a crucial time for asking stakeholders the right questions, performing research, determining resources, and clearly documenting the key components of a project.

These guiding questions and tips, compiled by dozens of project managers at Google, can help you facilitate conversations with stakeholders and team members to uncover the details of your new project.

Determine project details

When starting on a new project, it's helpful to determine the "5 W's" of the project. These guiding questions can help you **gather important project information and details**:

- **What** will be done? What are the actual steps of the project?
- **Why** is this project being undertaken? What is the problem you are trying to solve? How will the project and its deliverables help?
- **Who** will actually benefit from the project? Customers? Stakeholders? Employees?
- **When** does the project need to be completed, if it has a specific deadline? Not all projects do.
- **Where** will the project be completed? Locally? Internationally? In many locations?

Tips to help you determine project details

- To help determine project goals and ensure you thoroughly understand project details, ask three stakeholders from three different areas of the project to describe the project to you.
- After asking questions, synthesize those conversations into one project summary.

Set project goals

All projects should have clear goals. Often, these goals will be determined by senior leaders, with your help.

These guiding questions can help you **set project goals**:

1. What are the success metrics for this project?
2. What do various team members expect from the project?
3. What do the stakeholders want from the project?

Identify and define project scope

Project scope sets the boundaries of your project by defining what is and is not part of your project.

These guiding questions can help you **identify a project's scope**:

- Who is the project being delivered to?
- Who is the end user of the product or service?
- What is the size and complexity of the project?
- What is the project timeline
- What is the project budget?
- What resources will be required?

Tips to help you define scope

- Clearly define the scope in writing at the beginning of the project, and get every stakeholder to sign off on it. Refer back to what was defined and agreed to if someone suggests adding more.
- Challenge anything you believe is out of scope by suggesting what you think might be “scope creep” and asking stakeholders if they agree.
- If stakeholders disagree on scope, facilitate a conversation where they can find common ground.

Analyze costs and benefits

Proper initiation also helps ensure that the *benefits* of the project outcomes will outweigh the costs.

These guiding questions can help you **define costs**:

- What are the biggest risks for this project?
- What resources (money, time, people, supplies) will it take to solve the problem? How many people need to work on it? How much time will it take? Where will the resources come from?
- What would be the cost of not solving this problem?

These guiding questions can help you **define benefits**:

- What is the biggest problem you are trying to solve? How will your project solve it?
- How would you define “success” or “completion”?
- What are the direct or indirect benefits to the audience/users/organization?

Develop project documentation

Documenting and organizing project components provides visibility and accountability. It's common for project team members and senior stakeholders to reference and contribute to your project documents throughout the project.



Project Charter

- **Defines** project and outlines details in a clear, succinct format to ensure all project stakeholders agree on what success is.
- **Organizes** vital project information in a skimmable format to ensure that busy senior stakeholders have visibility and an opportunity to provide feedback.
- Is a **living document** that should be continually updated to provide a central source of truth that all team members and stakeholders can reference.
- Is **shared with stakeholders** who must approve it to advance to the planning stage.

What's in a project charter?

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|--------------------|------------------------|-----------------------|
| 1. Project summary | 3. Deliverables | 5. Benefits and costs |
| 2. Project goals | 4. Scope and exclusion | 6. Appendix |



[Download a project charter template](#)

Understand and leverage stakeholders

Stakeholders are anyone involved in the project who has a vested interest in the project's success.

These guiding questions can help you **better understand and leverage your stakeholders**:

- What are your most important priorities and goals? How does this project align with those?
- What role would you like to play in this project?
- Who else do you recommend I reach out to regarding this project?
- Here's how I plan to keep you informed—does that work for you?

Tips for working with stakeholders

- Review the organizational chart of your company and any supplier companies you are working with to ensure you understand the structure and titles. If there are titles you don't recognize, research them to see what they mean at different companies.
- If there are senior-level stakeholders, consider seeing if they have an administrative business partner or connecting with someone else on their team. Tell that person about your project, and ask their opinion on what role the senior person may want, if any. Then, ask them for an introduction, if necessary.