



Project Initiation Document (PID)

Date: 14<sup>th</sup> November 2016

Document No.: MS418/969

Revision: 2.0

# PROJECT INITIATION DOCUMENT (PID)

## *for* *Distance Learning Module Development*

### *Prepared for:*



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## EXECUTIVE SUMMARY

This document has been prepared to summarize the work produced for a Project Management Distance Learning course, in contract with the University of Strathclyde. INVICTA Ltd. developed an interactive set of presentations and additional learning material on three topics:

- Project Improvements (i.e. Six Sigma, Lean, Re-Engineering);
- New Product Development
- International Project Management

The project was coordinated between six staff, utilizing approximately 20 working days over a five week period from 10<sup>th</sup> October to 14<sup>th</sup> November 2016. In addition to the learning material, an online web interface was developed as a prototype for the Client. The final material was tested within the company to gain incorporate feedback and ensure suitable content. Overall the project ran well, although there is scope for improvement particularly if timescales and budget were extended to allow for use of additional learning tools.

## REVISION RECORD

Revision	Date	Description	Approval
1.0	9th November 2016	Initial draft for internal review.	All Authors
2.0	14th November 2016	Final copy for submission to Client.	All Authors

## DISTRIBUTION RECORD

Name	Position	Company
Dr Peter Flett	Client	University of Strathclyde
Stiven Almgren	Management Researcher	INVICTA Ltd.
Sergio Lamas Casas	Management Researcher	INVICTA Ltd.
Rebekah Findlay	Project Vice Manager	INVICTA Ltd.
Alexandros Ioannidis	Management Researcher	INVICTA Ltd.
Jasper Podschus	Management Researcher	INVICTA Ltd.
Marschenka Towle	Project Team Manager	INVICTA Ltd.



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**ABBREVIATIONS**

Abbreviation	Description
DL	Distance Learning
INVICTA	INVICTA Limited
ISO	International Standards Organization
Ltd.	Limited
MIT	Massachusetts Institute of Technology
PID	Project Initiation Document
REF	Reference



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## 1.0 INTRODUCTION

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INVICTA Ltd. have produced a three topic course as part of a Project Management Distance Learning (DL) Masters (MSc) on behalf of Dr. Peter Flett from at the University of Strathclyde (herein known as the Client).

The project commenced 10<sup>th</sup> October 2016 and was completed 14<sup>th</sup> November 2016.

Under the contract it was agreed that a mixture of seminar material and self-learning material would be developed, to ensure an interactive and innovative experience for students. Where applicable, real world projects have been incorporated by our multidisciplinary team.

The three core topics developed are as follows:

- Topic 1: Managing Process Improvement Projects
- Topic 2: Managing New Product Development Projects
- Topic 3: Managing an International Project

This Project Initiation Document, herein referred to as the PID, has been designed to summarize the development process, final deliverables and review the project from a business perspective.

### ***Project Objectives***

The Client has specified that where possible the course should use the latest DL methods and real world examples to provide an informative, interactive and innovative course.

It should also be fit for study by students from around the world, preferably as accessible as possible to allow for an enticing course for a range of students.

### ***Scope of Work***

The primary objective of the contract were to:

- Select three topics for the DL Course;
- Create approximately two hours of presentation or seminar material **per** topic;



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- Provide approximately six hours of additional, self-directed learning material for each topic.

It was made clear by the Client that quality or quantity would be reworded and therefore the 2 and 6 hour guidelines for the material are an approximation. INVICTA has endeavored through the project to ensure both the quality and quantity of material meets Client expectations.

The target audience for this work is deemed to be any student who would be able to access this course and so has been developed to use examples from all around the world. The most likely student will be a part-time or full-time postgraduate student, likely aged 21 or older. To take this course they are likely to be entrepreneurial and interested in modern business techniques. Therefore it has been assumed that the student would have some background knowledge. The language has been kept accessible to ensure ease of understanding for all students.

### ***Summary of Deliverables***

The agreed minimum deliverables under contract were the 2 hours of seminar materials and 6 hours of additional material per topic.

In addition to this, INVICTA has developed a website as an example for an interactive student platform and produced sample recordings of the presentation material as an example of how it could be delivered. This also ensured material was developed to meet the minimum requirements.

The responsibility for each project deliverable are discussed in Section 2 and the layout of the submitted material has been discussed in Section 3.



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## 2.0 PROJECT ORGANIZATION

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This section details how the DL Course has been developed by INVICTA within the time and budget restraints under a defined management structure.

### ***Project Team & Management***

This project was coordinated as a group six INVICTA employees from an international background, over a range of industry, including:

- Business management,
- IT and information management,
- Engineering disciplines:
  - Mechanical,
  - Electrical,
  - Chemical,
- Renewable / sustainable energy,
- Forensics,
- Biotechnology.

For the purpose of the project the Manager was Marschenka Towle and Administrator (Vice Manager) was Rebekah Findlay.

### ***Communication Strategy***

There are three key components to the communication strategy of this project.

- **INVICTA Project Team Communication:**

Due to prearranged travel arrangements, it was anticipated that the team would not always be available to meet. To ensure effective communication within the INVICTA team, a set of accessible platforms were utilized. Discussion primarily happened over Facebook (within a private group) and a cloud sharing platform (Dropbox) was used to allow for collaboration and different timetables. In addition, a remotely accessible timetable was created via TeamUp to highlight any clashes or gaps

(<https://teamup.com/ks088d37b81011e274>). Additionally, regular meetings were held by the project team, with the minutes provided in Appendix I of this report.





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- **INVICTA Client Communication:**

Client communication was conducted face to face at weekly meetings with the Client at the University of Strathclyde and over email, with the primary points of contact between Marschenka Towle, Rebekah Findlay and Dr. Peter Flett. Key Client communication has been provided in Appendix II of this report.

- **DL Course Communication:**

The materials that are going to be produced for a DL Course aimed at people who may be unable to attend university directly. Therefore the delivery platform has been developed such that each two hour topic can be accessed in smaller sections and allow for step by step student learning, for whenever suits them. Additionally, all programs currently used are freely available and can be accessed by all computers, phones and other electronic devices or be printed out if preferred. It is anticipated that student feedback will be done using a general feedback form and questions on online polling software to allow for both high-level immediate feedback and more detailed comments to be received

### ***Division of Deliverables***

The following table summarizes the key project items and deliverables to be supplied by INVICTA Ltd. to the University of Strathclyde. To ensure a fair workload the project was operated as a pair of personnel per topic, with those with the relevant expertise taking ownership of the general business and introductory items.

Initials have been placed in the name of each file submitted to indicate responsibility.

Project Item	Responsible
Project Initiation Document (PID)	M Towle & R Findlay
Meeting Minutes	R Findlay
Website	S Casas
Course (Lecturer) Briefing Document	M Towle
Course (Student) Briefing Document	M Towle
<i>Individual Topic Content:</i>	
Topic 1: Managing Process Improvement Projects	S Almgren & A Loannidis
Topic 2: Managing New Product Development Projects	J Podschus & M Towle
Topic 3: Managing an International Project	S Casas & R Findlay



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### ***Quality Management & Approvals***

INVICTA Ltd. is ISO 9001:2015 accredited and the Company holds continuous improvement and quality management in high regard. At multiple stages of this project the team has reviewed work internally and externally.

To ensure sufficient material had been produced to an acceptable standard, all seminar and self-directed learning material was tested within INVICTA, between the topic pairs, and sampled on impartial external parties for further feedback.

In addition, sample recordings and scripts of learning material have been produced to illustrate the delivery of the material of material.

A final team meeting was held on 14<sup>th</sup> November 2016 prior to submission to review the success of the project and provide feedback to the Client and to other group members for future work. The results of this are discussed in Section 7.

Signed review checklists for each topic are provided in Appendix III.

### ***Project Budget & Timeline***

The project was run to a budget of 20 days between the project team. For the amount of material developed, this imposed limitations on the available resources. However the project managed to come in slightly under the budgeted time.

The following table provides the estimated and actual days spent on each task defined for the project.

Additionally, the timeline of the project has been provided to further illustrate the division of labor and time spent on each deliverable.



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## **INVICTA PROJECT BUDGET**

Project Item	Working Days Budgeted	
	Estimated	Actual
Group Meetings	1.00	1.00
Project Kick-Off and Initial Research	1.00	1.25
Project Initiation Document (PID)	1.00	1.50
Course (Lecturer) Briefing Document	0.25	0.25
Course (Student) Briefing Document	0.25	0.25
Website	1.50	1.75
<u>Topic 1: Managing Process Improvement Projects</u>		
- Topic Summary and Objectives	0.25	0.10
- Presentation	3.50	3.00
- Presentation Recording and Transcript	0.50	0.50
- Additional Learning Material	0.75	0.50
<u>Topic 2: Managing New Product Development Projects</u>		
- Topic Summary and Objectives	0.25	0.10
- Presentation	3.50	3.50
- Presentation Recording and Transcript	0.50	0.40
- Additional Learning Material	0.75	0.75
<u>Topic 3: Managing an International Project</u>		
- Topic Summary and Objectives	0.25	0.10
- Presentation	3.50	3.00
- Presentation Recording and Transcript	0.50	0.60
- Additional Learning Material	0.75	0.75
<b>Total:</b>	<b>20.00</b>	<b>19.30</b>



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### INVICTA PROJECT TIMELINE

Week:	1							2							3							4							5							6
Day:	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M
Date:	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Group Meetings																																				
Project Kick-Off and Initial Research																																				
<b>Project Deliverables:</b>																																				
Project Initiation Document (PID)																																				
Course (Lecturer) Briefing Document																																				
Course (Student) Briefing Document																																				
Website																																				
<b>Topic Specific Deliverables:</b>																																				
- Topic Summary and Objectives																																				
- Presentation																																				
- Presentation Recording and Transcript																																				
- Additional Learning Material																																				

**Key:**

	Meetings
	Project Work
	Review
	Interim Submission
	Final Deadline



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## 3.0 STRUCTURE OF DELIVERABLES

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The deliverables will be provided in three formats.

Firstly, a bound hard copy will be submitted directly to the Client. To limit printing, only the mark sheet and PID will be printed with the hard copy.

The remaining material will be submitted as a soft copy to a shared server (MyPlace) by the Project Manager.

In addition to this, it was decided that the learning material should be provided on a webpage as a prototype for how a student may access the learning material in an alternative method. This is described in Section 5. The content of the soft copy is given below:

- **Corporate Files:**
  - Mark Scheme
  - Project Initiation Document (PID)
- **Website Files**
- **Lecturer Files:**
  - Course Briefing Document (Lecturer)
- **Student Files:**
  - Course Briefing Document (Student)
  - Individual Topic Folders:
    - Topic Summary & Learning Objectives
    - Presentation
    - Presentation Recording
    - Presentation Transcript
    - Additional Learning Material & Sample Questions



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## 4.0 SUMMARY OF TOPIC CONTENT

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The following three sections discuss the general content per topic. Specific learning objectives, extra material and questions are provided in the learning pack.

An introduction document has also been developed for both the lecturers and students to ensure material is understood.

For each of the presentations developed for the DL Course, a sample recording of a live classroom has been produced. INVICTA recommends this would be done using Skype conferencing software and recorded with Camtasia. This would allow students, if available, to ask questions directly to the lecturer and to each other. The sample recordings have been made with sample teachers and use Windows Movie Maker.

Topic 2 utilizes the online polling tool Mentimeter that allowed a sample class to successfully input their answers directly into the presentation. This received positive feedback and INVICTA would strongly recommend its use, where applicable, across the remainder of the material.

As discussed previously, a mark scheme has not been developed for this course as the University of Strathclyde has its own framework although assessment suggestions have been made. It is recommended by INVICTA that the University of Strathclyde could host the course on knowledge sharing platforms such as Coursera, which would allow students from all over the world to pay a small fee to achieve a certification in the Masters Course.

### ***Topic 1: Managing Process Improvement Projects***

This topic deals with managing process improvement projects including four key methods:

- Lean,
- Six Sigma,
- Re-Engineering (BPR), and
- EFQM.

The different methods will be displayed and explained in both how they work and also give some examples of how they can be implemented. Many business struggle with ineffectiveness which affects everyone. This can lead to an undesirable result or waster time and money. By first learning about these four methods of how to improve company's and projects, the first step in being more effective is taken.



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### ***Topic 2: Managing New Product Development Projects***

This chapter deals with managing task of new product development (NPD). After defining different new product categories this lecture discusses five general phases of new product development.

It demonstrates the given techniques with the aid of examples. This procedure enables the student to manage new product developments in their future work-life.

Additionally, specific NPD tools, both established and modern are covered to give the students an idea of the subtle differences and modern NPD thinking.

### ***Topic 3: Managing an International Project***

This topic will give an understanding to what an international project is and how to manage one outside of the UK. This will give insight into difficulties that may be encountered when expanding including culture, issues within the country and local work force. This will be followed by an awareness into why projects fail and go into details to why this may occur. Following this the process in which a project in plan is detailed and the Risk assessment process which takes place throughout the process. The cultural differences between countries are further examined in relation to the Hofstede Culture Dimensions. This provides an overview of how problems could be resolved are through cross cultural training.



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## 5.0 DISTANCE LEARNING WEBPAGE

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A webpage has been developed by INVICTA's team in a combination of HTML, JavaScript and CSS as a platform to make the learning material more accessible to students. This material includes:

- Topic summary and learning objectives
- PowerPoint slides
- Video recordings by lecturers
- Additional resources
- Sample questions

As well as enhancing the learning material it could be further developed to allow for a link to forums and encourage discussion (e.g. to allow commenting through Facebook). This could also be further developed to be opened on mobile phones as an app.

Although customization is useful, INVICTA would recommend using the free online website developer, Wix, in future as it provides a quick and easy way to develop a modern webpage and learning platform.

Figure 1 shows the sample welcome page and general design. There is a menu with all sections that is divided into:

- Introduction: Gives the user a general idea of the performance of the web app.
- Topics: In this section the user can run the distance learning material, such as presentations and video tutorial.
- Additional material: Provides the user with extra exercises in case the user wants to deep in any area.

### ***Instructions to Open Webpage***

The following instructions give a general understanding of how to open the webpage on a computer and access its content.

A copy of the web app has been provided in a ZIP file. In order to run such app, these instructions must be followed.

1. Download the ZIP file.
2. Decompress the invicta\_app\_MSc folder into the computer desktop folder.
3. Open the file MSc\_online\_course.html with Google Chrome or other web browser (located in invicta\_app\_MSc-public\_html).





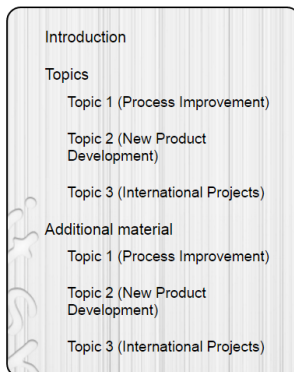
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## Welcome

Welcome to the course.

There are three topics as part of this Distance Learning module, created between the University of Strathclyde and INVICTA Ltd:

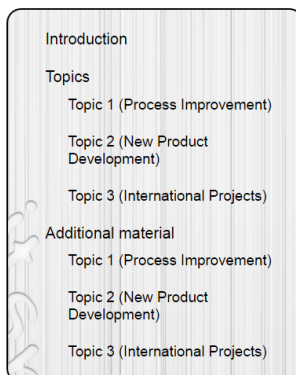
Topic 1: Managing Process Improvement Projects

Topic 2: Managing New Product Development Projects

Topic 3: Managing an International Project

Now click on the "Introduction" to start the course

FIGURE 1: SAMPLE WEB SITE WELCOME PAGE



## Introduction

This website aims to allow easy access to the core learning material. This includes:

- Topic summary and learning objectives
- Powerpoint slides
- Video recordings by lecturers
- Additional resources
- Sample questions

In the section "Topic" you can find the three sections of this course, you should first complete the theory material and afterwards, in the "Extra material section" complete the exercises exposed.

FIGURE 2: SAMPLE WEBPAGE FOR INTRODUCTION



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Introduction
Topics
Topic 1 (Process Improvement)
Topic 2 (New Product Development)
Topic 3 (International Projects)
Additional material
Topic 1 (Process Improvement)
Topic 2 (New Product Development)
Topic 3 (International Projects)



**FIGURE 3: SAMPLE WEBPAGE FOR PRESENTATION SLIDES**



Introduction
Topics
Topic 1 (Process Improvement)
Topic 2 (New Product Development)
Topic 3 (International Projects)
Additional material
Topic 1 (Process Improvement)
Topic 2 (New Product Development)
Topic 3 (International Projects)

## Topic 1 (Process Improvement)

[Click here for Extra exercises](#)

[Click here to see the script part 1](#)

[Click here to see the script part 2](#)

**FIGURE 4: SAMPLE WEBPAGE FOR ADDITIONAL MATERIAL**



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## 6.0 ADDITIONAL LEARNING TOOLS

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As well as researching real world examples of projects for the course material, the project team also explored interactive learning tools. This was conducted by the team brainstorming what tools were used in their favorite classes or seminars, and then conducting additional research around the topic.

There are a variety of technologies available to interact remotely with students and enhance their learning. Due to budget constraints, not all were utilized although we felt it important to summarize the tools that were found for future consideration by the University of Strathclyde.

Distance learning is not a new concept, however with the growth and accessibility of technology, and open university courses there is no longer a reason for a course to solely rely on documents and presentations. From universities using online platforms to provide free online courses (including prestigious institutes such as MIT) to a code university with no teachers (42).

It is important that all learning tools should add to the experience and serve a purpose. As such, we believe that they should be used where possible to produce a captivating course for students.

A particularly popular concept, that has even started to be used in job applications, is games based learning and testing, in which an activity is translated into a simple and interactive game to make the experience more enjoyable and memorable, similar to interactive case studies.

The resources are discussed in the table below, which not only summarizes their content but also indicates if they have been used and whether INVICTA would specifically recommend them.

Learning Tool	Description	Used?	Recommended?
Camtasia	Recording tool for saving presentations and audio.	N	N
Coursera	Online source of free and paid courses from around the world.	N	Y
Dipity	Chronological timeline builder.	N	N
Doceri	Interactive whiteboard.	N	Y
Dropbox	File sharing platform.	Y	Y
Educreations	Interactive whiteboard and learning platform.	N	N



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Learning Tool	Description	Used?	Recommended?
eLearning	Online learning forum for students to discuss.	N	Y
Email	The easiest tool	Y	Y
Explain Everything	Interactive whiteboard and screen sharing tool.	N	Y
Facebook	The social media platform can be used as an accessible forum and file sharing tool. However, can overlap too much to existing use and distract students.	Y	Y
Google Drive	File sharing and editing platform. Useful for easy collaboration between students.	Y	Y
MadCap	Allows simple webpages and apps to be generated based on imported web documents. Also allows for social media forums to be integrated.	N	Y
Mentimeter	Online quiz and polling software. Displays results in colorful and clean manner.	Y	Y
Microsoft NetMeeting	Virtual meeting software.	N	N
Microsoft PowerPoint	Presentation software.	Y	Y
Pinterest	Utilization of social media to gather ideas on different topics or in groups.	N	Y
Prezi	Modern presentation software and host for free	N	Y
realtimeboard	Interactive whiteboard for online course.	N	Y
Scribblar	Collaboration and whiteboard tool	N	Y
ShowMe	Online learning community	N	N
Skype	Allows for conference calls and screen sharing with live chat.	N	Y



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Learning Tool	Description	Used?	Recommended?
sli.do	Online quiz and forum accessed by a hashtag from laptop or mobile.	N	Y
SlideShare	Online presentation host.	N	Y
SlideSnack	Presentation sharing tool with capability to create quizzes.	N	N
Speak	Free conference calling.	N	N
Stormboard	Online planning and brainstorming tool.	N	Y
Ted Talks	Renowned talks from professionals on a range of topics.	Y	Y
Toondoo	Comic strip and cartoon maker.	N	Y
Twiddla	Online collaboration platform.	N	Y
Videoscribe	Allows for video scribing using a recorded whiteboard video.	N	N
WebEx	Online conferencing and recording tool.	N	Y
Website (JavaScript)	Generates tailored website for user needs and preferences.	Y	N
WeVideo	Online video maker and editors.	N	N
Wix	Free, modern and simple website generating tool.	N	Y
Windows Movie Maker	Allows quick and simple videos to be made against images.	Y	Y
YouTube	Numerous video channels with excellent learning resources and helpful explanations. Student can tailor to what style suits them. Although quality and accuracy of information is more difficult to ensure.	Y	Y



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## 7.0 CONCLUSIONS & REFLECTIONS

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As part of INVICTA's quality management, upon completion of the course materials, the project team met to review any issues and future suggestions.

It was agreed that the project as whole ran successfully. Client communication had been effective and helpful to guarantee expectations were met.

Having a multidisciplinary team was greatly rewarding and allowed a breadth of material and real world examples to be discussed. We believe has led to well-rounded content that will encourage students to gain a deep understanding these topics across a range of industries.

The table below summarizes suggestions the project team discussed for INVICTA and the Client for future work:

Reference No.	Comment	Suggestion
REF-01	Limitations on budget to use all suggested tools as discussed in the review in Section 6.	Client review – extend budget, willing to do future development for this.
REF-02	Scheduling issues due to four different departments.	INVICTA to review, helpful to have variety in background but limited productivity.
REF-03	One team member, Alexandros Ioannidis, had constraints that led to him large operating alone as opposed to a group. This led to slide content being mismatched with the rest of the work.	Ensure more time allocated to allow for review of presentation material and allow for additional quality management steps.
REF-04	General comments have been made, where applicable, for sample questions and assessment techniques. However, it was outside the scope for full testing and mark scheme review. Understanding is that the University of Strathclyde has existing framework.	Client review – INVICTA willing to develop formal assessment material if required.
REF-05	The project timeline in Section 3 indicates that the project ran up until the final day, with much review done in the final week. This left less time for review and error checking.	Ensure more time allocated to allow for review of presentation material and allow for additional quality management steps and contingency for unexpected issues.



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## 8.0 REFERENCES

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## **APPENDIX I: MEETING MINUTES**

---

***12 October, 2016***

### **I. Call to order**

A regular meeting of INVICTA Ltd. at 10:00am on October 12, 2016 at the Andersonian Library.

### **II. Roll call**

Rebekah Findlay conducted a roll call. The following persons were present: Sergio Lamas Casas, Stiven Almgren, Marschenka Towle, Jasper Podschus and Alexandros Ioannidis.

### **III. Agenda**

- Discuss and choose topics for project.
- Decide upon group of people this is aimed at
- Come up with ideas on how to make project intractable

### **IV. Discussion**

a) Topics decided upon:

- Managing process improvement projects (including lean, six-sigma, re-engineering, EFQM).
- Managing new project development.
- Managing an international project (Outside UK).

b) Interested in aiming this at last year of high school students (16-18 year olds) as an introduction to business management where all the chosen topics can be intertwined.

On reading instructions again this is meant to be an MSc module. Clarification is required.





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- c) Rough ideas suggested: Case studies, cartoons, presentations, online interactive activities, recordings.

Further research required.

**V. Actions to be carried out by next meeting**

- a) Email Dr. Flett to check aims of the project.
- b) Look for case-studies about topics that have been chosen.

**VI. Issues for next meeting**

- a) Assign roles to each person in the group and divide work load
- b) Discuss ideas and see if any common ideas are found

**VII. Adjournment**

Marschenka Towle adjourned at 12:00pm.

Minutes submitted by: Rebekah Findlay

**VIII. Next Meeting will be held on 17 October, 2016 at 2:00pm.**



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***17 October, 2016***

**I. Call to order**

A regular meeting of INVICTA Ltd. at 2:00pm on October 17, 2016 at the Andersonian Library.

**II. Roll call**

Rebekah Findlay conducted a roll call. The following persons were present: Sergio Lamas Casas, Stiven Almgren, Marschenka Towle, Jasper Podschus and Alexandros Ioannidis.

**III. Agenda**

- a) Assign roles to each person in the group and divide work load
- b) Discuss ideas and see if any common ideas are found

**IV. Discussion**

- a) 6 Sigma Ideas
  - New developments and can be combined with new development
  - International
    - Language
    - Culture
    - Telephone / broadband
    - Time difference
    - Climate
  - Production Side of 6-sigma
    - New Product
    - Re-engineering
    - New project plan



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b) EFQM – Excellence model

- 3 groups – Result (customer), company, innovation
- Sure – Deodorant – Decrease of packaging

c) Structure for direct teaching

- ~20 minute sections (Conclusion shorter)

1. Introduction (each topic - brief)
2. Process improvement
3. New Projects
4. International project
5. How they all connect
6. Conclusion

2 people to each section

d) Structure for distance learning

- Record lectures live
- Talk over for lecture slides
- Sketch video
- Rap
- Onlinequizcreator.com
- Presentation

e) People assigned to each topic

- New Project – Marschenka + Jasper
- Project Improvements – Alex + Stiven
- International project – Sergio + Rebekah

**V. Actions to be carried out by next meeting**

Gather information on assigned subject

**VI. Issues for next meeting**

Beginning of creating lectures



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**VII. Adjournment**

Marschenka Towle adjourned at 3:00pm.

Minutes submitted by: Rebekah Findlay

**VIII. Next Meeting will be held on 21 October, 2016 at 2:00pm.**



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***21 October, 2016***

**I. Call to order**

A regular meeting of INVICTA Ltd. 2:00pm on October 21, 2016 at the SIPBS building, University of Strathclyde.

**II. Roll call**

Rebekah Findlay conducted a roll call. The following persons were present: Sergio Lamas Casas, Stiven Almgren, Marschenka Towle, Jasper Podschus and Alexandros Ioannidis.

**III. Agenda**

- a) Discuss what is happening with each individual group

**IV. Discussion**

- a) Stiven and Alex
  - a. Rough idea of what they are doing
  - b. Going to start recording lectures
  - c. Alex – completed lecture slides for his part however change is required
- b) Marschenka and Jasper
  - a. Started main body of research
  - b. Have a good idea of where they are going
- c) Sergio and Rebekah
  - a. Started main body of research
- d) All slides are to be kept plain and editing will be done at end of process

**V. Actions to be carried out by next meeting**

- a) Meet in individual groups and get lecture material completed



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**VI. Issues for next meeting**

- a) Go over material
- b) Decide on format for PowerPoints
- c) Go over ideas for distance learning

**VII. Adjournment**

Marschenka Towle adjourned at 3:00pm.

Minutes submitted by: Rebekah Findlay

**VIII. Next Meeting will be held on 31 October, 2016 at 2:00pm.**



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***31 October, 2016***

**I. Call to order**

A regular meeting of INVICTA Ltd. at 15:00 on October 31, 2016 in the Hamnet Wing Lobby (SIPBS).

**II. Roll call**

The following persons were present: Sergio Lamas Casas, Stiven Almgren, Marschenka Towle and Jasper Podschus.

Apologies from Rebekah Findlay.

Absentee, Alexandros Ioannidis.

**III. Agenda**

- Discuss the progress of individual topic groups.
- Decide on layout of submission files, presentation design and Project Initiation Document (herein referred to as the PID).
- Discuss deadline aims, any potential conflicts before submission and next meeting.

**IV. Discussion**

- Progress by topic:
  - Topic 1: Managing Process Improvement Projects (Stiven & Alex)
    - Stiven to follow up with Alex
    - Will updated slides to match other topics
    - Aim to have work complete next Monday (7<sup>th</sup> November)
  - Topic 2: New Product Development (Jasper & Marschenka)
    - Aim to have work complete by Saturday
    - Will meet during the week (circa 3pm Friday) to ensure progress as required
  - Topic 3: International Projects
    - Completing slide material



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- Aim to have work complete next Monday (7<sup>th</sup> November)
- Agreed on basic slide design (Topics 2 & 3 both use this presently)
- Agreement would like content and additional learning materials to be complete by Monday 7<sup>th</sup> November
- Previously Rebekah had produced a layout for the PID. Within the meeting, a shared document was created with a high level structure for the PID to be combined with Rebekah's work prior to the next meeting.
- Suggested structure for submission folder (to be submitted as zip file):
  - Introduction (i.e. summary / introduction to the course)
  - Folder for each topic including slides, notes / script, recordings, additional material and instruction document
  - Team Project Report (i.e. PID), containing minutes, evidence of meetings, agreement of responsibilities, reflection on the project / the project management as defined by Dr Peter Flett
- Suggested structure for PID:
  - Title
  - Introduction
  - Motivation for project / objectives
  - Content, structure, scope
  - Method (how the project was conducted as a whole)
  - Method (how each topic was conducted)
  - Agreement of responsibilities (overall and within each topic)
  - Project reflection
  - Minutes and evidence of meetings

**V. Actions to be carried out by next meeting**

- a) Meet with group members to ensure lecture materials ready for Monday 7<sup>th</sup> November – All Group Members.
- b) Create topic folder, instruction documentation and describe group method and responsibilities where possible to aid in PID and submission folder creation next week – All Group Members.
- c) Email Peter Felt with clarifications for submissions – Marschenka Towle.
- d) Review PID layout, produce a draft for group discussion at next meeting – Rebekah Findlay & Marschenka Towle





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**VI. Issues for next meeting**

- a) Provide feedback on presentations and lecture materials
- b) Discuss how to ensure we meet the mark scheme
- c) Produce documents explaining content / navigation
- d) Discuss the PID and any changes / additions to this

**VII. Adjournment**

Meeting adjourned at 16:00.

Minutes submitted by: Marschenka Towle

**VIII. Next meeting will be held on 7 November, 2016 at 14:00.**



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***7 November, 2016***

#### **I. Call to order**

A regular meeting of INVICTA at 14:00 on November 7, 2016 at the SIPBS building, University of Strathclyde.

#### **II. Roll call**

Rebekah Findlay conducted a roll call.

The following persons were present: Sergio Lamas Casas, Stiven Almgren, Marschenka Towle, Jasper Podschus and Alexandros Ioannidis.

#### **III. Agenda**

- a) Discuss plans for project completion
- b) PID form to be looked over

#### **IV. Discussion**

- a) Stiven and Alex
  - a. Lecture material has been looked over and changes that need to be made have been discussed
- b) Marschenka and Jasper
  - a. On plan for what needs to be done and will be completed by Wednesday
- c) Sergio and Rebekah
  - a. Slides near completion
  - b. Sergio has plans for distance learning materials
- d) All slides are to be kept plain and editing will be done at end of process
- e) All formatting for everything will be completed and quality controlled by end of week

#### **V. Actions to be carried out by next meeting**

- a) Each group will submit a copy of work by Wednesday to Marschenka to be made into required format



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**VI. Issues for next meeting**

- a) Completion of project.

**VII. Adjournment**

Adjourned at 17:00.

Minutes submitted by: Rebekah Findlay

**VIII. Next Meeting will be held on 10<sup>th</sup> November, 2016 at 16:30.**



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***10 November, 2016***

**I. Call to order**

A regular meeting of INVICTA Ltd at 16:30 on November 10, 2016 in the Andersonian Library, at the University of Strathclyde.

**II. Roll call**

The following persons were present: Sergio Lamas Casas, Marschenka Towle and Jasper Podschus.

Apologies from Stiven Almgren and Rebekah Findlay.

**III. Agenda**

- Review deliverables.
- Discuss website.
- Discuss PID and comments.
- Agree on work to finalize

**IV. Discussion**

- Marschenka will finish PID
- Presentation slides and recordings to be completed for Saturday
- The website will be a prototype and learning material uploaded
- Agreed final meeting to sign documentation

**V. Actions to be carried out by next meeting**

Ensure work is completed. Print and bind PID.



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**VI. Issues for next meeting**

Ensure work is completed.

**VII. Adjournment**

Meeting adjourned at 17:00.

Minutes submitted by: Marschenka Towle

**VIII. Next meeting will be held on 14 November, 2016 at 14:00.**



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***14 November, 2016***

**I. Call to order**

Final meeting of INVICTA Ltd. DL Masters Group at 14:00 on November 14, 2016 in the Hamnet Wing Lobby (SIPBS).

**II. Roll call**

The following persons were present: Sergio Lamas Casas, Stiven Almgren, Marschenka Towle and Jasper Podschus.

Apologies from Rebekah Findlay and Alexandros Ioannidis.

**III. Agenda**

- Sign documentation
- Reflect on project
- Handover project to Client

**IV. Discussion**

- Group happy with production of work
- Ensured all documentation is as agreed

**V. Actions to be carried out by next meeting**

NA

**VI. Issues for next meeting**

NA



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**VII. Adjournment**

Meeting adjourned at 15:00.

Minutes submitted by: Marschenka Towle

**VIII. No further meetings required.**



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## APPENDIX II: CLIENT CORRESPONDENCE

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During the project several additional comments were made to clarify the project scope and submission requirements.

The following pages provide the relevant correspondence between INVICTA's Project Manager, Marschenka Towle, and the Client contact, Dr. Peter Flett.

### ***C-01 (14 October, 2016)***

Web enabled PM tool

Peter Flett <myplace-post-notifications@strath.ac.uk>

Fri 14/10/2016 12:01

Advanced Project Management

Categories: Advanced PM

I thought this might be of interest - I have been a keen user of a mind mapping tool called MindGenius for a number of years - developed and created by a Scottish company called Gael. They are in the process of beta testing a web enabled project management app that also incorporates mind mapping and a host of other tools. They have been crowdfunding to complete its development and it is due to launch this month. Its a good example of a software development project - if you want to give it a try head to <http://www.barvas.com/beta> and sign up.

Kind regards

Peter

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***C-02 (24 October, 2016)***

RE: Advanced Project Management Schedule

Peter Flett <peter.flett@strath.ac.uk>

Mon 24/10/2016 22:01

To: Marschenka Towle <marschenka.towle.2016@uni.strath.ac.uk>;

Categories: Advanced PM

Hi Marschenka

What does the group think? Given the group is more than one person I would suggest that it is two hours per subject - you can distribute the 6 hours for personal research between the three topics. The individual assessment is usually handed in on the same day as the MS418 exam - this is timetabled centrally and as yet is not confirmed but it will be in December.

Kind regards

Peter

Dr Peter Flett,  
Dept of Management Science,  
Strathclyde Business School,  
University of Strathclyde,  
199 Cathedral Street,  
Glasgow,  
G4 0QU  
Tel: 07769670022

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**From:** Marschenka Towle [marschenka.towle.2016@uni.strath.ac.uk]

**Sent:** 24 October 2016 21:08

**To:** Peter Flett

**Subject:** Advanced Project Management Schedule

Hello, I was just wanting to clarify a couple of points regarding coursework.

For the group coursework, is it expected that each of the three topics selected has a two hour seminar? Or is it two hours in total? Also, would this mean 6 hours of additional material per topic or total? 😊

With regards to the individual assignment, is there any timescale for this yet? Things are about to get very manic and a lot of travel for the Industrial Biotech course (and I am sure others too! :)) and it would be very helpful if there was a rough idea of when this might be due? 😊

Thank you 😊

Marschenka



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### ***C-03 (1 November, 2016)***

RE: No lecture next week - online material available, deadline and exam date (MS418 only)

Peter Flett <peter.flett@strath.ac.uk>

Tue 01/11/2016 12:09

To: Marschenka Towle <marschenka.towle.2016@uni.strath.ac.uk>;

Categories: Advanced PM

Hi Marschenka – answers below

**Yes that would be useful** - For the hard copy of the document, would you expect a bound copy of the report? Or usb/cd along with this?

**Zip file from one of the group will be fine** - As there will be a large number of files, will one person submit a zip on myplace or would it be better to spread it between?

**Up to the group** - With regards to the PID, would the reflection section be an individual/personal feedback? Or just discussion on how the project went and improvements/hold ups?

**It will be assessed in context of the other material** - Also, how will the 6 hours of material be assessed? Just worried how it will be measured and don't want to be too vague. Would it be sufficient to provide a reading list and a video/links, or would it need to be more (e.g. group exercises, sample questions etc) - the comment re not needing to produce coursework threw us off a bit – **again up to the group – not looking for the actual 6 hours worth of material but more links and pointers to material that would justify 6 hours of self-directed learning.**

- Would you hope to see an explanation of how we determined how long the material would last to complete? **Good idea – if you have done research on this that would be really useful.** And sample answers/guideline/mark scheme? Again that would be useful.

Kind regards

Peter

Dr Peter Flett,  
Dept of Management Science,  
Strathclyde Business School,  
University of Strathclyde,  
199 Cathedral Street,  
Glasgow,  
G4 0QU  
Tel: 07769670022



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-----Original Message-----

From: Marschenka Towle [mailto:marschenka.towle.2016@uni.strath.ac.uk]

Sent: 01 November 2016 11:33

To: Peter Flett <peter.flett@strath.ac.uk>

Subject: Re: No lecture next week - online material available, deadline and exam date (MS418 only)

Hi, Hope you had a good weekend :)

I just wanted to ask a few questions about the coursework:

- For the hard copy of the document, would you expect a bound copy of the report? Or usb/cd along with this?
- As there will be a large number of files, will one person submit a zip on myplace or would it be better to spread it between?
- With regards to the PID, would the reflection section be an individual/personal feedback? Or just discussion on how the project went and improvements/hold ups?
- Also, how will the 6 hours of material be assessed? Just worried how it will be measured and don't want to be too vague. Would it be sufficient to provide a reading list and a video/links, or would it need to be more (e.g. group exercises, sample questions etc) - the comment re not needing to produce coursework threw us off a bit
- Would you hope to see an explanation of how we determined how long the material would last to complete? And sample answers/guideline/mark scheme?

Thank you:  
Marschenka

---

From: Peter Flett <[myplace-post-notifications@strath.ac.uk](mailto:myplace-post-notifications@strath.ac.uk)>

Sent: 28 October 2016 11:32:21

Subject: No lecture next week - online material available, deadline and exam date (MS418 only)

Just a reminder that there is no class next Monday (31st Oct). However, I have put up some extra material online. There is an online lecture from last year which will provide some background to project planning. There is also a definition of a Project Initiation Document (PID). In respect to the group project I mentioned the role of the PID - for me as the client the PID should be like an instruction manual, guiding me through the submission, providing me with a logical framework on how to use the material. It should also have some details as to the project process and how well (or otherwise!) it was executed. Finally, I would suggest that the PID/Report (or whatever you want call it!) is also provided as a hard copy in addition to the files you will submit online. Large organizations still ask for paper copies of tender bids in addition to online copies (Glasgow City Council and Edinburgh City Council - have two different kinds of online tendering system, yet still ask for paper submissions because of the issues they have had with electronic submissions) I have just had the MS418 exam date confirmed as Thu Dec 15th 2.00- 4.30 in the Barony (High Street). This will also be the deadline date for the MS969 individual assignment - the details for which I will issuing after the group assignment submission date. Finally, just to confirm that the group project deadline is the 14th November as there is an erroneous date from last year lurking about that I need to delete (thanks for drawing my attention to this Carlos).

Have a great weekend!

Kind regards  
Peter

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## ***C-04 (8 November, 2016)***

Hard copy of group assignment and delivery

Peter Flett <myplace-post-notifications@strath.ac.uk>

Tue 08/11/2016 10:30

As stated in the lectures and in a previous post I would like a hard copy of your group assignment - I will leave it up to you as to what you want to provide (e.g. PID and material or just PID, or whatever format you want to provide). Please deliver the hard copies to the Department of Management Science, Level 7, Sir William Duncan Building. Please respect the staff's lunchtime - if the door is closed they will be back at some point. Additionally, if you are using a website or some other web enabled technology please ensure it works out with the campus network.

Kind regards

Peter

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Document No.: MS418/969

Date: 14<sup>th</sup> November 2016

Revision: 2.0

**Topic Name:** Managing New Product Development Projects

**Date:** 14th November 2016

**Deliverables:**

- Topic Summary and Objectives
- Presentation
- Presentation Recording and Transcript
- Additional Learning Material

☐  
☐  
☐  
☐

**Additional Notes:**

**Produced By:**

J Podschus & M Towle

**Reviewed By:**

S Almgren

**Approved By:**

R Findlay



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Document No.: MS418/969

Date: 14<sup>th</sup> November 2016

Revision: 2.0

**Topic Name:** Managing an International Project

**Date:** 14th November 2016

**Deliverables:**

- Topic Summary and Objectives
- Presentation
- Presentation Recording and Transcript
- Additional Learning Material

☐  
☐  
☐  
☐

**Additional Notes:**

**Produced By:**

S Casas & R Findlay

**Reviewed By:**

J Podschus

**Approved By:**

M Towle