**WEEK FIVE**

**Project Initiation and Planning (pip)**

This is stage is aimed at transforming a vague system request document into a tangible project description. A key consideration when conducting PIP is deciding when PIP ends and when analysis begins.

The major activities that occur during this phase:-

* Project initiation
* Project planning

**Project Initiation**

Focuses on activities designed to assist in organizing a team to conduct project planning, some of the activities carried out during this stage are as follows; however some may be unnecessary depending upon the size, scope and complexity of the system.

* Establishing the project initiation team

Selecting those people within the organization who will become part of the analysis and design team - requires matching people and skills to problems and circumstances. The effective analyst should know the staff, their past work experience, and individual personality traits as well as their technical strengths and weaknesses.

* Establishing a relationship with the customers

One or more analysts are assigned to work with a customer, i.e. a member of the business group that requested or will be impacted by the project, to establish work standards and communication procedures.

* Establishing the project initiation plan
* Establishing management procedure

**Project Planning**

Is the process of defining clear, discrete activities and the work needed to complete each activity within a single project. The activities carried out may include the following; however these depend on the size, scope and complexity of the project.

* Describing the project scope, alternatives and feasibility
* Dividing the project into manageable tasks
* Estimating resources and creating resource plan. Numerous assumptions about resource and potential problems are made. The analysis justification for an information system presented in terms of the tangible and intangible economic benefits and costs, and the technical and organization feasibility of the proposed system.
* Developing a preliminary schedule – the time should be limited.
* Developing a communication plan
* Determining project standards and procedures
* Identifying and assessing risk
* Creating a preliminary budget
* Developing a Statement of Work (SoW)
* Setting a Baseline Project Plan (BPP).

The major deliverables and outcomes from this phase are the Baseline Project Plan (BPP) and the Statement of Work (SoW).

The BPP contains all information collected and analyzed during project initiation and planning. The plan reflects the best estimate of the project’s scope, benefits, costs, risks, resources required, etc.

The BPP specifies detailed project activities for the next life cycle phase analysis. It is used by project selection committee to help decide whether project should be accepted, redirected or cancelled. If selected the BPP becomes the foundation documents for all subsequent SDLC activities.

The Statement of Work (SoW) is a short document prepared for the customer that describes what the project will deliver and outlines all work required to complete the project. SoW assures that both you and your customers gain a common understanding of the project and is a very useful communication tools.

**Statement of Work**

A sample SOW may include:-

* Title/Name of organization and Data of SOW
* Project Name
* Project Manager
* Customer
* Project sponsor
* Project Start/End (projected)
* Staff / Development estimates – Names and number of months.

Project Description Sample

*This project will ………………………………………………………………………………………….*

*The purpose of this system is to automate the ……………………………………………………. save employees time, reduce errors ………………………………………………………………….*

Objectives.

*1.)……………………………………………………………………………………………….*

*2.)……………………………………………………………………………………………….*

*3.)……………………………………………………………………………………………….*

Phases of work

*The following tasks and deliverables reflect the current understanding of the project.*

*1.)……………………………………………………………………………………………….*

*2.)……………………………………………………………………………………………….*

*3.)……………………………………………………………………………………………….*

*In the Analysis……………………………………………………………………………………………. ……………………………………………………………………….....................................................*

*…………………………………………………………………………………..……………………………………………………………………………………………………..…………………………………………………………………………………………………..………...................................................*

The BPP is supposed to evolve as the project evolves i.e. new information learned during subsequent SDLC phases will help in updating the BPP.

**The Baseline Project Plan**

This is a document where all the information collected during project initiation and planning are collected and summarized into:

**Contents:-**

a) Introduction

Provides a brief overview of the entire document and outlines a recommended course of action for the project.

Overview - *Executive summary that specifies the projects scope, feasibility, justification, resource requirements and schedules.*

A brief statement of the problem - *environment in which system is to be implemented, and constraints that affect the project are provided.*

Recommendation – *Provides summary of important findings form the planning process and recommendations for subsequent activities.*

Scope

*Name of Company………………………. Prepared by ………………………….*

Statement of Project Scope *Date:… ……………………………….*

*………………………………………………………………………………………………………………………………………………………………………………………………………………………………….*

General Project Information

*Project Name: …………………………………….*

*Sponsor………………………………*

*Project Manager …………………….*

*Problem/Opportunity Statement*

*1.)……………………………………………………………………………………………….*

*2.)……………………………………………………………………………………………….*

*3.)……………………………………………………………………………………………….*

Project Objectives

*1.)……………………………………………………………………………………………….*

*2.)……………………………………………………………………………………………….*

*3.)……………………………………………………………………………………………….*

Project Description

*Describe what the new IS will do………………………………………………………………………….*

Business Benefits

*1.)……………………………………………………………………………………………….*

*2.)……………………………………………………………………………………………….*

*3.)……………………………………………………………………………………………….*

Project Deliverables

*1.)……………………………………………………………………………………………….*

*2.)……………………………………………………………………………………………….*

*3.)……………………………………………………………………………………………….*

Estimate Project Duration

*……………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………….*

b) System Description

* Alternatives – provides a brief presentation of alternative system configurations.

eg. - Mainframe with central database

- Distributed with decentralized database

- Batch data input with online retrieval

- Purchasing of prewritten package.

At this stage, your objective is only to identify the most obvious alternative solution. More details are covered during analysis stage.

* System Description – provides a description of the selected configuration and a narrative of input information, tasks performed, and resultant function.

c) Feasibility Assessment

Provide a discussion, justification or analysis of all the feasibilities (feasibility study).

d) Management Issues

* Team configuration and management – provides a description of the team member roles and reporting relationships.
* Communication Plan for managers, team members and customers
* Project standards and procedures – evaluation and acceptance of deliverables to the customers.

Reviewing the Baseline Project Plan

Before the next phase of the SDLC can begin, the user, management, and development groups must review the baseline project plan to assure that the proposed system conforms to organizational standards and to make sure that all relevant parties understand and agree with the information contained in the BPP.

This is done before presentation to any approval body. A common method of performing this review (as well as review during subsequent life-cycle phases) is called a structured walkthrough.

Walkthrough are peer group reviews of any product created during the systems development process. Most walkthroughs are not rigidly-formal or exceeding long in duration. It is important to have the following individuals playing specific roles:-

* Coordinator – Plans the meeting and coordinates a smooth meeting process. Maybe the project leader.
* Presenter – Describes the work product to the group usually an analyst who has done some or all of the work being presented.
* User - person/group that makes sure the work product meets the need of the project’s customer. Someone not in the project team.
* Secretary – takes notes, records, decisions and recommendations
* Standards Bearer – Ensures that the work product address to organizational technical standards.
* Maintenance oracle - Reviews the work product in terms of future maintenance activities.