

HOW TO USE THIS TEMPLATE:

Introduction

The template reflects the steps set out in the PRINCE2 Method and is designed to prompt the Project Manager and help in the creation of the Project Initiation Document (PID). There is also a Product Description for the PID at Appendix A of the PRINCE2 Manual.

The Project Initiation Document will reflect the information contained in the Project Approach, mainly integrated within the Project Plan. The PID will be created by expanding the Project Brief: there are separate Templates for the Project Brief and Project Approach.

Loading the file

This template has been produced using Microsoft Word 2003. To use it, load up the file directly from the directory and starting from page 1 follow the prompts (in [...] brackets).

Deleting the [...] text

When the template is complete, the whole Project Initiation Document can be printed and approved.

Prior to printing, you should delete all [...] prompt text.

Saving the Project Initiation Document under its own name

Save the Project Initiation Document by selecting the "SAVE-AS" command; this will avoid overwriting the standard template. You must specify your own Project Directory.

Once your PID is completed check the document against the following Quality Criteria:

- The Project Initiation Documentation correctly represents the project
- It shows a viable, achievable project that is in line with corporate strategy or overall programme needs
- The project organization structure is complete, with names and titles. All the roles have been considered and are backed up by agreed role descriptions. The relationships and lines of authority are clear. If necessary, the project organization structure says to whom the Project Board reports
- It clearly shows a control, reporting and direction regime that can be implemented, appropriate to the scale, risk and importance of the project to corporate or programme management
- The controls cover the needs of the Project Board, Project Manager and Team Managers and satisfy any delegated assurance requirements
- It is clear who will administer each control
- The project objectives, approach and strategies are consistent with the organization's corporate social responsibility directive, and the project controls are adequate to ensure that the project remains compliant with such a directive
- Consideration has been given to the format of the Project Initiation Documentation. For small projects a single document is appropriate. For large projects it is more appropriate for the Project Initiation Documentation to be a collection of stand-alone documents. The volatility of each element of the Project Initiation Documentation should be used to assess whether it should be stand-alone, e.g. elements that are likely to change frequently are best separated out

PROJECT DOCUMENTATION

PROJECT INITIATION DOCUMENT (PID)

Project:

Release:

Date:

PRINCE2

Author:

Owner:

Client:

Document Ref:

Version No:

1 Project Initiation Document History

1.1 Document Location

This document is only valid on the day it was printed.

The source of the document will be found at this location – *[insert folder structure]*

1.2 Revision History

Date of this revision:

Date of next revision:

Revision date	Previous revision date	Summary of Changes	Changes marked
		First issue	

1.3 Approvals

This document requires the following approvals.

Signed approval forms should be filed appropriately in the project filing system.

Name	Signature	Title	Date of Issue	Version

1.4 Distribution

This document has been distributed to:

Name	Title	Date of Issue	Version

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3 Project Definition

[Extracted from the Project Brief. Explains what the project needs to achieve. It should include:

- Background
- Project objectives and desired outcomes
- Project scope and exclusions
- Constraints and assumptions
- The user(s) and any other known interested parties
- Interfaces]

4 Project Approach

[Extracted from the Project Brief. Defining the choice of solution the project will use to deliver the business option selected from the Business Case, and taking into consideration the operational environment into which the solution must fit]

5 Business Case

[Describing the justification for the project based on estimated costs, risks and benefits]

6 Project Management Team Structure

[A chart showing who will be involved with the project]

7 Role Descriptions

[For the project management team and any other key resources]

8 Quality Management Strategy

[Describing the quality techniques and standards to be applied, and the responsibilities for achieving the required quality levels]

9 Configuration Management Strategy

[Describing how and by whom the project's products will be controlled and protected]

10 Risk Management Strategy

[Describing the specific risk management techniques and standards to be applied, and the responsibilities for achieving an effective risk management procedure]

11 Communication Management Strategy

[To define the parties interested in the project and the means and frequency of communication between them and the project]

12 Project Plan

[Describing how and when the project's objectives are to be achieved, by showing the major products, activities and resources required on the project. It provides a baseline against which to monitor the project's progress stage by stage]

13 Project Controls

[Summarising the project level controls such as stage boundaries, agreed tolerances, monitoring and reporting]

14 Tailoring of PRINCE2

[A summary of how PRINCE2 will be tailored for the project]

13 Project Controls

14 Tailoring of PRINCE2