

In this session, we're going to talk about the first phase in any project: Initiation, sometimes referred to as the Concept or Create phase.

This is where we lay the foundations for a successful project. It is triggered because the need for a project has been identified, for example there is customer demand for a product or service not currently provided by your organisation.

Or, there are issues within the organisation which need to be resolved, for example there are processes or functions within the business which could and should be improved, in order to reduce unacceptable levels of waste, inefficiency or staff frustration.

Once the need has been agreed upon, the **feasibility** of the project should be determined.

Before any project goal or objective is embarked upon, surely someone should be asking the vital question: **should we be doing this?** Is this project a worthwhile venture, will the end result be beneficial? One way of answering these questions is to conduct a **SWOT analysis**.

Consider the organisation's current situation in terms of the **strengths** which will help you to achieve the goal and the **weaknesses** which could hinder the process. Then look to the future – by achieving the project goal, what are the **opportunities** the organisation will be able to grasp, and what **threats** will we be exposing the organisation to? Using a four box grid, list as many ideas as you can think of for each SWOT element.

Now let's analyse the results. If the strengths and opportunities outnumber the weaknesses and threats, then overall this is a worthwhile project and we should continue with it. However, if the opposite is the case and the cons are more numerous than the pros, then the project should be abandoned, either temporarily or permanently.

At this phase, the project team will then be selected.

Their duties here will include discussing alternative ways of achieving the project's goals, evaluating the alternatives and choosing one to build their planning around. The team members will also begin preparing basic proposals and schedules for the project, and a basic budget where applicable.

During this first phase of the project, time should also be taken to clarify the project's **imperatives and desirables**.

The imperatives are the *must haves* of the project, what the project must at least deliver to the customer if they are to be satisfied with the end result.

Desirables are the *'nice to haves'*, that is: if the project could also deliver some additional functions or elements, then the customer would be even happier. The desirable elements tend to add to the scope of the project, because the project is now expected to deliver more for the customer.

Project team members need to have a clear picture in mind of the imperative and desirable elements of their project, because later on at phase three: 'execution and control', if the project is not on track then corrective action will have to be taken.

This may involve negotiation with the customer, to agree which of the desirable elements will be sacrificed, whilst maintaining delivery of the imperatives. In terms of project documentation, this phase typically generates a **Project Brief**, also known as a Project Charter or a Statement of Work. So, let's recap the key points from this session:

Project Initiation occurs when the **need** for a project has been identified.

The **feasibility** of the project must be determined, before the project team is brought together.

The team will then get busy discussing **strategies, timelines** and if applicable, the **budget**.

The team will also need to clarify the **imperatives and desirables**, i.e. what the project must at least deliver, and also what it could deliver above the minimum acceptable standard for the customer.

And finally, all of this information is then compiled in the **Project Brief**.