

PM 1001 – Project Initiation

Course Outline

Revised: 2020

Duration: 1 Day

PMBOK Guide (6th Edition) Process Group: Project Initiation

Course Description:

Provides an overview of the Project Management Institute (PMI) Project initiation processes using the guidelines and best practices from Project Management Body of Knowledge (PMBOK GUIDE) framework. The course covers the steps taken to identify the need for, and justify, the project, determine the high-level project requirements, establish the initial project scope, create a Statement of Work that describes the project outcomes and constraints, and create the Project Charter which formally recognizes the existence of the project and provides the Project Manager authority to manage the project.

Course Learning Outcomes

Upon successful completion of the course, the student will be able to

- Conduct the Project Initiation processes
- Identify the need for a project
- Justify the project using analytical techniques
- Identify the main project stakeholders and their expectations
- Analyze the project risks and constraints
- Create a Statement of Work
- Develop the initial project scope
- Consider organizational and external influences on the project
- Create a project charter

Course Topics

1. Introduction
 - The project initiation processes
 - How projects are started
 - Who's involved
 - Construction sector specifics
1. Identifying the need for the project

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- The project goals
 - High-level project requirements
 - Description of deliverables
 - Target completion date
 - Budget availability
 - Identification of the Project Sponsor
2. Project justification
 - Business case
 - Benefits management plan
 - Feasibility study
 - Financial analysis, return on investment
 - Identify how the project aligns with the organization’s strategic goals
 3. Identifying the main project stakeholders and their expectations
 - Identify the primary project client
 - Determine who the end users are
 - Document stakeholder expectations
 - Define stakeholder roles and responsibilities
 4. Analyzing risks and constraints
 - Identify major project risks
 - Define the project constraints: budget, schedule, and scope
 - Consider the availability of human and physical resources
 - Consider environmental constraints
 5. Creating a Statement of Work
 - Describe the project outcomes
 - Describe the characteristics of the project deliverables
 - Agreement with stakeholders
 6. Developing the initial Scope of Work
 - Define the main project tasks
 - Develop the resource requirements
 7. Considering organizational influences
 - Organizational standard policies, processes, and procedures
 - Portfolio, program and project governance framework

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- Monitoring and reporting methods
- Historical information, lessons learned

8. Considering external influences

- Government/industry standards
- Legal or regulatory requirements and/or constraints
- Marketplace conditions
- Organizational culture and political climate
- Organizational governance framework

7. Creating the project charter

- Document the client expectations
- Document the summary project costs and milestone schedule
- Document the project constraints
- Identify the Project Manager
- Set the basis for measuring the project manager's performance
- Define roles and responsibilities between the Project Sponsor and the Project Manager
- Sign-off