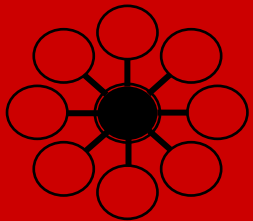


[Project name] [Project no.]

Project orientation workshop

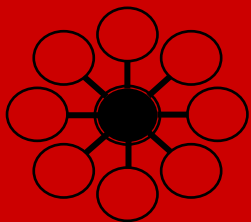


# Objectives

This workshop is part of the initial project planning and definition process.

Its objectives are:

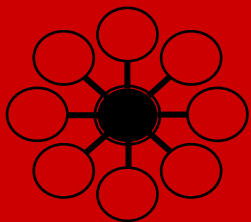
- To understand this project's purpose
- To explain the management framework within which the project will be managed
- To agree our roles & responsibilities
- To understand the development process



# Agenda

This workshop  
looks at:

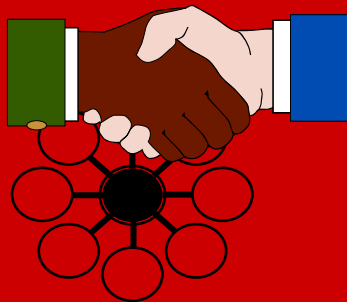
- Introductions
- Business context
- Project structure
- Delivery
- Work environment
- AOB



# Introductions

Do you all know each other? If not, please tell us:

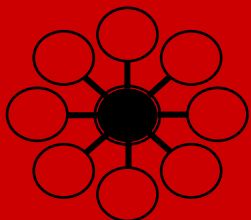
- Your name
  - Background
  - Experience of this kind of system/project
- 
- More about the team later...



# The Business Case

The ultimate goal of this project is to deliver the business case.

In summary, it looks like this:



- We will deliver...
  - [list planned business benefits]
- And it will be worth...
  - [summarise business value of benefits]
- We will deliver all this by...
  - [summarise delivery schedule]
- The total project budget is...
  - [summarise development costs]
- We also have to make sure of the following...
  - [list compliance requirements]
- We have to deal with these risks...
  - [review main business risks]

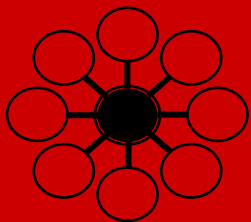
**What do you think the major *issues* are likely to be?**

For more details, see the CBA in [ref.]

# The Project's Strategic Goals

The project will contribute to these strategic goals:

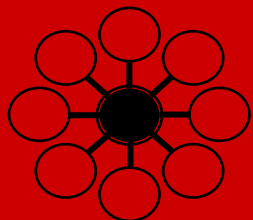
- Business ...
  - [discuss overall business strategy and issues]
- Information ...
  - [discuss business information impacts and issues]
- Architectural ...
  - [discuss architectural impacts and issues]
- Business process re-engineering ...
  - [review re-engineering impact and issues]



# Business Objectives & Benefits

This is what the project will deliver to the business:

- These goals will have been achieved when we achieve these verifiable objectives:
  - [summary of objective/target 1]
  - [summary of objective/target 2]
  - [etc.]
- This will deliver these major benefits:
  - [summary of benefit 1]
  - [summary of benefit 2]
  - [etc.]

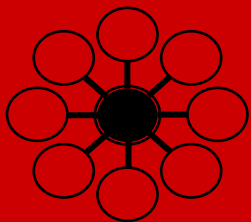


What will the *critical success factors* be?

# Business Impact

The business areas to which this project will contribute are:

- [business area 1 name]
  - [business owner]
  - Functions
  - Organisation
    - Roles
    - Staff
    - Markets, offices & organisational units
    - Work volumes
  - Major processes
    - [review the business's work flow diagram]
- [business area 2 name]
  - [as above]

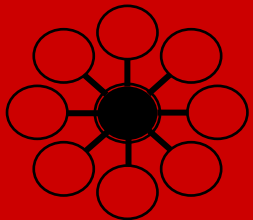


Is it clear what the *business* purpose of this project is?

# Existing Systems

This is a summary of the systems we will be working on, and what we are going to do to them:

- [Paste in copy of existing conceptual design]

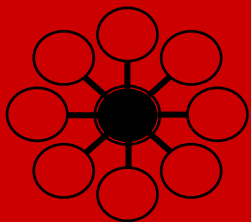


Is it clear what the *system* objectives of this project are?

# Project Organisation

These individuals will participate in this project:

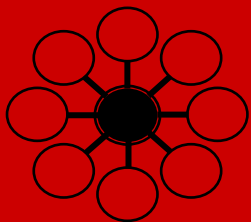
- The Project Sponsor is...
  - [identify Project Sponsor by name and position]
- The Project Owner is...
  - [identify Project Owner by name and position]
- The Business Project Manager is...
  - [identify Business Project Manager by name and position]
- The teams leads are...
  - [identify team leaders by name, system & responsibilities]



## Other Stakeholders

These are the other stakeholders involved:

- [vendors]
- [outsource/contracting organisations]
- [regulatory groups]



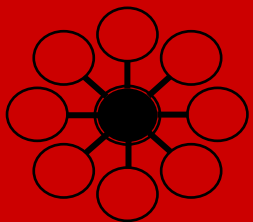
Have you worked with them before?

What will the *critical success factors* for a successful relationship will be?

# Stakeholder Contacts

These are our stakeholder contacts:

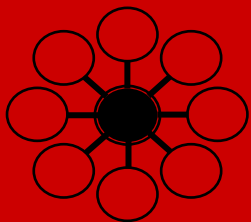
	Project team member	Stakeholder member
Business partners		
Other internal stakeholders		
Related projects		
Suppliers		



# Related Projects

This is a summary of the other changes that are going on in parallel to our project, to achieve the overall strategic goals:

- Related projects in...
  - The business
  - IT Operations
  - Business Operations
  - Others
- Projects to which we deliver
  - [list projects to which we must deliver, what is to be delivered, and when]
- Projects that will be delivering to us
  - [list projects from which things must be delivered, what is to be delivered, and when]

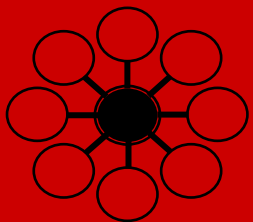


**What do you think the major *dependencies* are likely to be?**

# Project Organisation

This is how the project will be organised:

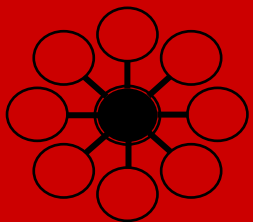
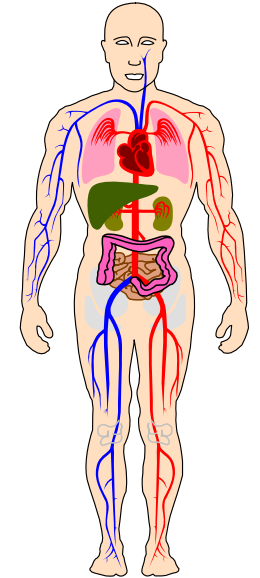
- Steering Committee
  - [review roles - phase end reviews, escalation, etc.]
  - [review membership]
- Organisation chart
  - [review chart]
- Project leads
  - [review role]



# Roles & Responsibilities

This is how we will work together:

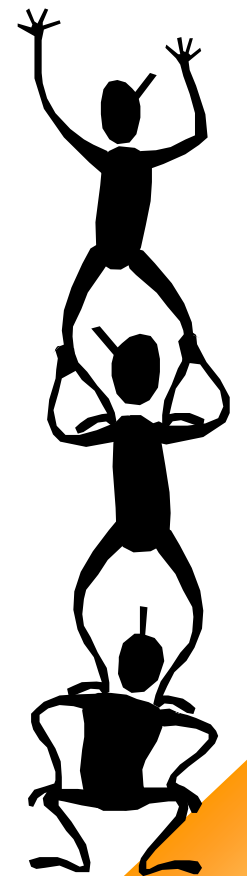
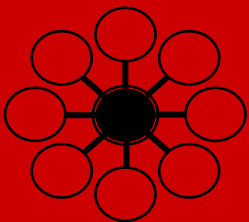
- This is what each of you will be doing:
  - [main technical roles]
  - [project management/admin/QA roles]
  - [other roles and responsibilities]
- Is it clear to you what you will be doing?
  - Your own job(s)?
  - The rest of the team's jobs?
- If not, ask now, and ask again whenever you lose track of your job!



# Project Management Processes

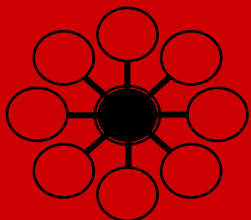
A little more about how the project will work:

- Progress review schedule
  - Frequency
  - Responsibilities
- Issue & risk management & processes
  - Tools/repositories
  - Logs
  - Reviews
  - Responsibility for monitoring/chasing
- Change management & processes
  - Logs
  - Reviews
  - Responsibility for monitoring/chasing
- Progress/status reporting processes
  - RAG reporting
  - Templates
  - Responsibilities
- Escalation process



# Delivery Schedule

This is a summary of the delivery schedule:



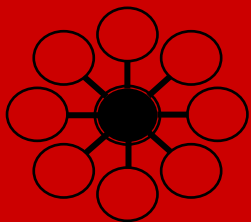
- Project start & end
- Deliveries will take place...
  - [detail delivery requirements]
- The main phases will be completed at...
  - [detail planned phase completion dates]
- Other important milestones are...
  - [detail main milestones]
- Major dependencies occur at...
  - [list major linkages]

**Do you think this is  
*achievable?***

# The Delivery Process: Support Groups

In order to deliver this project successfully, we need the support of these non-business groups:

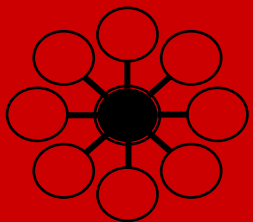
- Quality/Compliance/Audit
  - [summarise role]
  - [summarise role]
- Architecture
  - [summarise role]
- Operations + support
  - [summarise role]
- Vendors
  - [summarise role]
- And also...
  - [summarise role of any other supporters]



# The Delivery Process: Critical Path

Given the project's planned schedule, here are the key issues:

- This is the critical path
  - [review critical path tasks and schedule]
- Some potential issues & risks are...
  - [review possible delivery problems]
  - [review potential time and resource bottlenecks]
  - [etc]



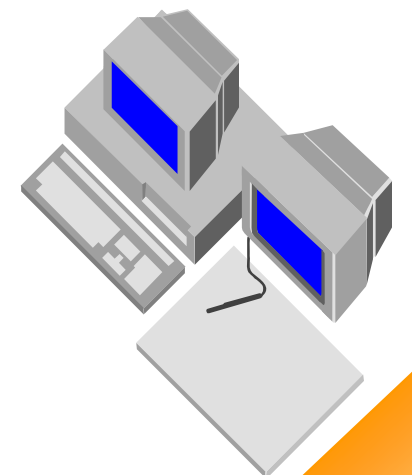
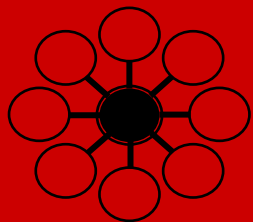
**Would you envisage any other problems?**

**Can you see any ways to improve the critical path?**

# The Development Environment

Here is a summary of the project development environment:

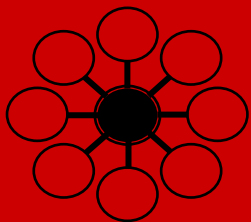
- Approach
  - [note exceptions from standard approach]
- Methods, tools & techniques
  - [summarise]
- Interfaces
  - [summarise related systems]
  - [summarise related repositories]
- Test environment
  - [summarise]
- Document repository
  - [summarise]
- Project standards & procedures
  - [summarise]



# Help

If you need help,  
you can ask:

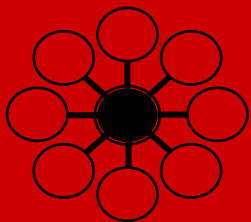
- Strategic framework
  - Values + policies
  - Goals + objectives
  - Programmes + projects
- Global standards database
- Help Desks
- Knowledge database
  - Processes + methods
  - Tools + techniques
  - Templates
- Business unit issues, risks & change management database
- HR database
  - Guidelines, forms, templates



# Project Administration

This is the basic administrative framework

- Status reports will be ...
  - [summarise status reporting requirements]
- Time reporting will be...
  - [summarise status reporting requirements]
- Project office contacts
  - [for newcomers especially, summarise the role of the Project Office]



## Any other business?

Now you know what the job is, are there any personal issues you would like to raise?

- Availability?
- Skill shortages?
  - Technical skills
  - Process/Methodology training
  - Other problems?
- Holiday plans?
- Are there any project issues you want to raise?
  - Issues
  - Risks
  - Opportunities

