

## **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 Documentation (PID). There is also a Product Description for the PID at Appendix A of the PRINCE2 Manual.

The Project Initiation Documentation 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. 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 Documentation 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 Documentation 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 PID correctly represents the project
- It shows a viable, achievable project that is in line with corporate, programme management or customer strategy or overall programme needs
- The project management team 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 management team 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, programme management or the customer
- 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 and approaches are consistent with the organization's 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 PID. For small projects a single document is appropriate. For large projects it is more appropriate for the PID to be a collection of stand-alone documents. The volatility of each element of the PID 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 DOCUMENTATION (PID)

**Project:**

Release:

Date:

## PRINCE2

Author:

Owner:

Client:

Document Ref:

Version No:

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## 1 Project Initiation Documentation History

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### 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]*

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### 1.2 Revision History

Date of this revision:

Date of next revision:

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

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### 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

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### 1.4 Distribution

This document has been distributed to:

Name	Title	Date of Issue	Version

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## **2 Table of Contents**

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### **3 Project definition**

[Explaining 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]

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### **4 Project approach**

[To define the choice of solution that will be used in the project to deliver the business option selected from the business case, taking into consideration the operational environment into which the solution must fit]

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### **5 Business Case**

[(See section A.2) Describing the justification for the project based on estimated costs, risks and benefits]

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### **6 Project management team structure**

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

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### **7 Role descriptions**

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

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### **8 Quality management approach**

[(See section A.22) Describing the quality techniques and standards to be applied, and the responsibilities for achieving the required quality levels. Where the project is subject to the commissioning organization's quality management policies/strategies, the PID should make reference to them rather than duplicate them. Where the project is not

subject to the commissioning organization's quality management policies/strategies, appropriate strategies/ approaches should be documented]

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## **9 Change control approach**

[(See section A.3) Describing how and by whom the project's products will be controlled and protected. Where the project is subject to the commissioning organization's change control policies/strategies, the PID should make reference to them rather than duplicate them. Where the project is not subject to the commissioning organization's change control policies/strategies, appropriate strategies/ approaches should be documented]

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## **10 Risk management approach**

[(See section A.24) Describing the specific risk management techniques and standards to be applied, and the responsibilities for achieving an effective risk management procedure. Where the project is subject to the commissioning organization's risk management policies/strategies, the PID should make reference to them rather than duplicate them. Where the project is not subject to the commissioning organization's risk management policies/strategies, appropriate strategies/ approaches should be documented]

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## **11 Communication management approach**

[(See section A.5) To define the parties interested in the project and the means and frequency of communication between them and the project. Where the project is subject to the commissioning organization's communication management policies/strategies, the PID should make reference to them rather than duplicate them. Where the project is not subject to the commissioning organization's communication management policies/strategies, appropriate strategies/ approaches should be documented]

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## **12 Project plan**

[(See section A.16) 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 management stage by management stage]

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## **13 Project controls**

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

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## **14 Tailoring of PRINCE2**

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