

NHSmail Project Initiation Document Template

Version 2
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1. Project definition

In this section, please complete; **what the project needs to achieve**. This will include setting clear project goals, requirements and the scope for both the project schedule and budget. A succinct project definition will help aid the creation of a project plan that contains all necessary actions and required results.

For example, to migrate to NHSmail, manage transition of staff utilising NHSmail, uptake and introduction to instant messaging, updating policies and procedures to support the change to NHSmail.

2. Project approach

In this section, please complete; **how the required end product is to be created**. Consider what skills you require and how are you going to acquire those that you do not already have. Also, consider what methodology / approach you are going to use, ensuring the chosen option maximises the chance of achieving overall success for the project.

Please see below some key points that should be identified, within the project approach:

- any constraints which could affect the timings of the project
- all industry standards which need to apply to the project
- all security constraints
- the criticality of the project outcome
- the options available for delivering the project product
- the operational impacts of the chosen approach
- how the finished product will be implemented
- the training requirements of the end user
- the most appropriate approach.

For example, managed migration vs self-migration, what computing/IT facilities will you use/require, what other facilities/resources will you use/require, are there constraints around availability and if funds are required to acquire IT facilities, have these been allocated?

3. Full business case

In this section, please complete; **a justification for the project, to be measured against cost, time, risk and benefits to ensure there is continued business justification.** The business case should be aimed at the key decision makers, who in turn should also be involved in the project to truly understand the business justification.

The full business case should outline the:

- overall aim of the project
- preferred way forward whilst also identifying alternatives
- risks
- benefits
- indicative costs
- project plan
- project sponsor
- responsible staff within the project

For example, failing email service therefore beneficial to migrate to NHSmail. Instant messaging and presence allows for enhanced collaboration and communication internally and externally, preference for managed migration however self-driven migration is also available.

4. Risk management strategy

In this section, please complete; **how the management of risks will be incorporated within the project.** This should include the risks which could be encountered during the project, how the risks will be dealt with and how risks are reviewed during the project.

The Risk management strategy could contain the following:

- risk identification: to identify any risks within the project. A decision would then need to be made to either manage or accept the risk
- risk prevention: how to mitigate or manage the likelihood or consequence of a risk
- risk management: how risks will be dealt with, if they cannot be prevented, and what contingency plans are in place for such events
- risk monitoring: processes in place to routinely assess and review the risks associated within the project.

5. Configuration management strategy

In this section, please complete; **how the project assets will be managed and by whom.** This should include processes and management techniques that safeguard the product requirements and certify that changes to the product are properly evaluated, authorised and implemented.

The configuration management strategy could cover:

- how and where the project's products will be stored
- how various versions and variants of project products will be identified
- how changes to project products will be controlled
- who is responsible for configuration management

This section should allow for informed business decisions and will help to ensure that the work products are within the agreed scope.

For example, it has been identified OneDrive for Business should also be used, which is a variant to the product. This would need to be evaluated, authorised and implemented. The changes to the product would have to be recorded for continued project control.

6. Quality management strategy

In this section, please complete; **how the project will ensure that the products are fit for purpose**. This will be achieved by recording the quality techniques and standards that will be applied throughout the project. The responsibilities for quality should be clearly defined.

The quality management strategy could contain the following:

- quality definition: what quality standards will be used and how quality will be measured
- quality assurance: to record the quality related activities. Ensure the quality assurance method is appropriate for the selected standards. The assurance should appease stakeholders by indicating how the project will meet the quality expectations
- quality control: the use of quality techniques and standards put into practice to produce an outcome. If the quality standards are not met then the defect would then need to be managed (acceptance, re-do, adjust)
- quality improvements: how could quality standards be improved to reduce the gap between the current product and the expected product, whilst improving efficiency and effectiveness?

7. Communication management strategy

In this section, please complete; **a description of the means and frequency of communication to those both internal and external to the project.** Providing an understood and consistent method of communication throughout the project.

The communication management strategy could contain the following:

- defining the audience: list key stakeholders who will need information throughout the project
- defining the requirements: what information the stakeholders require during the project and the level of detail i.e. how technical communications need to be
- define a communications schedule: a flexible schedule as to when communications should be made, along with variances dependent on the type of communication
- defining the communications technology: an appropriate method for communicating information should be selected, to establish successful delivery of information.

The communication management strategy should facilitate the engagement with stakeholders, through a controlled and bi-directional flow of information.

8. Project management team roles

In this section, please complete; **how the project will be organised and managed, along with the responsibility and accountability of those within the project team.** This section should clearly identify reporting lines and job roles, so that everyone is clear of what is expected from them.

An example of a project team:

- project sponsor: has the ultimate authority and control over the project
- project manager: managing the day to day running of the project, to provide the project board with information so informed decisions can be made
- team manager: manages the project team delivering the project product, to receive direction from the project manager
- project team: receives direction from the team manager in how to proceed with delivering the project product.

9. Project plans

In this section, please complete; **the defined project stages along with the product/outcome, the time and the costs for each stage.** The project plan should state how to complete the project within a given timeframe; this can be achieved by setting objectives, identifying deliverables and planning the schedule (normally a Gantt chart).

The project plan should be able to answer the following:

- the key activities required
- the main outputs
- the main deliverables
- what responsibilities resources have within the project
- the project schedule
- when key milestones will be completed

The project plan could contain the following:

- assignments: the major tasks and milestones that will be completed during the project
- schedule: a summary of the anticipated schedule containing the estimated time involved for the project (a full project plan would be completed outside of the PID)
- human resources: how many days activity will be needed to complete the project and, as such, how many resources will be required and what skills sets will the resources need

Figure: Example of a project plan

	Month 1				Month 2				Month 3				Month 4				Month 5			
	W1	W2	W3	W4																
Stages (run in parallel)																				
Stage 1 - Initial interest/considerations	■																			
Stage 2 - Initiation	■	■	■																	
Stage 3 - Running the project	■	■	■	■	■	■	■													
Stage 4 - Migration readiness assessment					■	■	■	■	■	■										
Stage 5 - Rollout										■	■	■	■	■	■	■	■	■	■	■
Stage 6 - Post-migration review activity																			■	■

10. Project controls

In this section, please complete; **how the progress of the project will be monitored and communicated**. This should contain the data gathering, management and analytical processes used to understand the variances from the project baseline and how through the communication of this information, the schedule issues or project risks can be planned, managed and mitigated.

Project controls can encompass the following:

- a strategy or method which will help the project manager to optimise future outcomes
- keeping up to date, accurate schedules
- cost estimation and control
- risk management and mitigating risk
- document control

11. Project product description

In this section, please complete; **a description of the final product and how it is fit for purpose.**

The project product description could contain the following:

- purpose of the product
- scope of the product
- details of the product
- delivery of the product
- quality expectations
- acceptance/review criteria