

PROJECT INITIATION

&

KICKOFF PROCESS

DOCUMENT

VERSION HISTORY:

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1. INTRODUCTION

This document is written to define the standard process for initiating and formally launching projects within EBS. It ensures proper evaluation, alignment, resource planning, and stakeholder engagement before execution begins, following industry best practices suitable for a technology-driven organization.

2. PROJECT INFORMATION

Project Name	
Project Owner	
Project Manager	
Date	

3. BACKGROUND

<Briefly describe the context of the project>

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4. PROJECT OBJECTIVES

<Highlight the project objectives>

5. EXPECTED BENEFITS

<Explain what value this project is meant to deliver>

6. OPTIONS APPRAISAL

<Briefly describe what options have been considered for this project. Identify the preferred option.>

Option	Description	Implications	Risks
Do nothing			
Do the minimum			
Do something			

Preferred Option: <Detailed explanation on preferred option>

7. SCOPE

In Scope

<Highlight tasks included in the project>

Out of Scope

<Highlight tasks that will not be covered in the project>

8. ROLES AND RESPONSIBILITIES

Role	Name	Responsibility
Project Sponsor		
Project Manager		
Business Analyst		
Product Owner		
Developers		

9. PROJECT APPROACH

<Identify preferred project approach>

10. PROCESS FLOW

Step 1: Idea/Initiative Origination

- Project idea, need, or request is identified by any department or client.
- Client **may** submit a draft Business Case to justify the initiative.

Step 2: Project Request Form Submission

- The Client receives and completes the *Project Request Form* provided by the PMO.

Step 3: Project Request Form Review

- PM conducts a preliminary review to assess the following:
 - Completeness of information
 - Strategic alignment with the company's objectives.
 - Resource availability

Step 4: Business Case Development (if not provided by Client)

- PM creates a draft business case from sessions or the request form.
- Project Owner/Sponsor approves business case.

Step 5: Project Clarification

- PM may request additional details or clarifications from the Client if needed.
- Internal stakeholders may be consulted to evaluate feasibility.

Step 6: Project Documentation

- PM prepares and submits a Project Proposal (includes high-level scope, cost, timelines etc.).
- Project Sponsor approves the proposal, sends it to the client.
- Once accepted, the PMO begins compiling the Project Charter.
- Management approves the Charter to officially initiate the project.

Step 7: Requirement Gathering and Documentation

- Collaborative sessions begin with internal stakeholders to gather business needs and translate them into the BRD (Business Requirement Document).
- Client signs off on the BRD; internal stakeholders validate alignment if cross-functional.

Step 8: Project Kick-off

- Once all key documents are approved, PM schedules the Project Kick-off Meeting.

11. PROCESS REVIEW

This process will be reviewed annually or upon significant changes in PMO structure, business strategy, or technology stack.

12. REQUIRED DOCUMENTS

- Project Request Form
- Proposal
- Business Case
- Project Charter

13. PROJECT SIGN OFF

NAME:	
ROLE:	
SIGNATURE:	
DATE:	