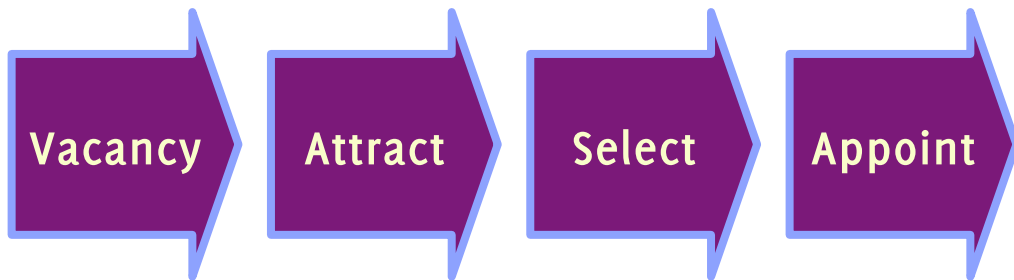


A Leadership Library resource
to accompany

A project leader's guide to
**Recruitment
and Selection**



*How to create a
Project Initiation Document
for use in
Recruitment and Selection projects*

**Eddie Lunn
Alan Sarsby**



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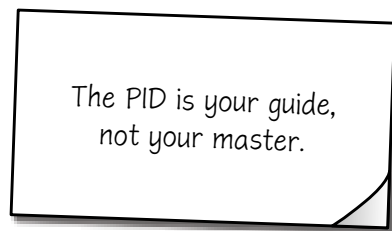
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1 Creating a PID for Recruitment and Selection

1.1 The benefit of the Project Initiation Document

The Project Initiation Document (PID) is the single most important document of project leadership. The PID performs three functions:

- The PID is the authorising document for your project — it authorises the use of resources; time, people, and money. It aligns the key stakeholders at the start of the project to gain and hold their commitment.
- It the planning and resourcing tool for your project; it provides an overview of the project, the purpose, the governance structure and accountabilities, and an outline plan.
- It is a primary communications document for the project team, others outside the project who might want to know more, and especially for temporary members of the project team.

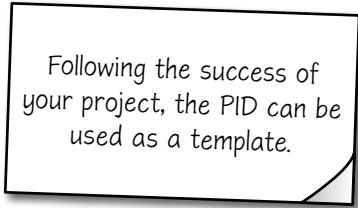
The act of thinking about and writing a PID results in a project with clarity of what it is to achieve, and importantly what is out of scope and hence not a goal. This prevents scope-creep, which is a major cause of project failure.

The PID provides the reference document to review the project and measure success.

1.2 The scope of the PID

A typical PID has the following parts:

- A purpose statement (often repeated on the front cover).
- The business drivers and need for the project (including alternatives).
- The expected outputs and outcomes (the deliverables).
- An outline plan of the project.
- An identification of the major risks and dependencies.
- A list of the resources required.
- The governance structure, (and authorisation) of key stakeholders.
- A timetable for milestones, monitoring and reporting, and the final review.



Following the success of your project, the PID can be used as a template.

2 Crafting your Recruitment and Selection PID

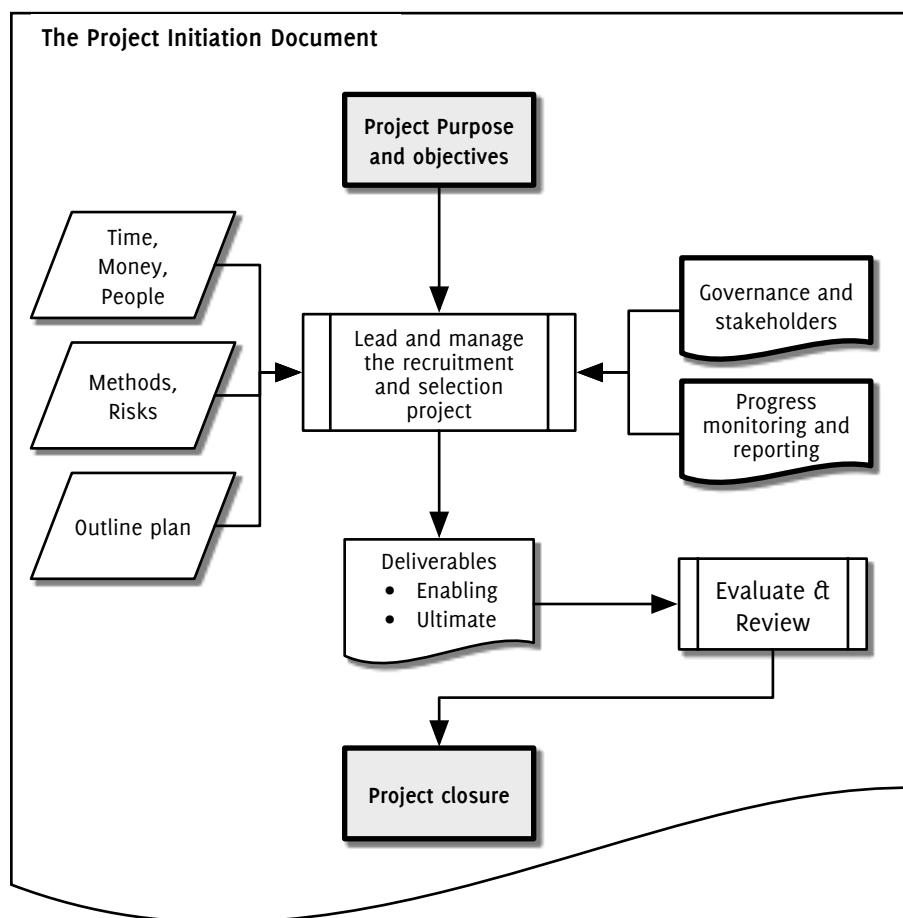


Figure 1 — Typical Recruitment PID showing the key parts

Figure 1 is a planning tool for creating a PID. It can also be used as a visual communications device, for example in a presentation.

2.1 Engage your stakeholders: Identify your readers

The adage of writing for your reader is true for a PID as for any other document. The readership for a PID is broadly:

- The project sponsor (the executive who is the customer for the project). The PID performs the function of a customer service agreement in which the top-level detail of what the project is expected to deliver in return for an investment of resources.
- Senior executives who are probably outside the project but have a specific interest. For example, your colleagues in Finance have a fiduciary duty; those in Human Resources who have a duty to comply with employment law; and those in the Legal team whose job it is to keep the organisation out of jail. These stakeholders often require highly condensed information that can be scanned, read, and understood — very quickly.
- You and your team members who need a reference document that outlines the project and what it is to achieve.

A typical PID is succinct — perhaps as little as three pages and rarely exceeding ten pages.

2.2 The Project background and objectives

Your various stakeholders are unlikely to all have the same understanding of the background to the recruitment and selection needs, So it is worth investing a few paragraphs to synchronise your readership (stakeholders, team members, and others) with why the project came about. This background is a brief summary of the decisions that led to the project. See chapter 3 of *A project leader's guide to Recruitment and Selection* for the approach.

A direct purpose statement that succinctly defines the project follows these background paragraphs. For example:

The purpose of this project is to appoint a Key Account Manager by 1 September 2015.

Your purpose statement synchronises your stakeholders, your team, and the people who are temporary members of the team, so that everyone understands what the project is to achieve.

2.3 Outline plan of your recruitment

The purpose of the outline plan is to provide your project with a structure. The alignment and positioning of the component stages assists your preparation, timing, priorities, and resource planning. Your structure and outline plan depends on the complexity of your recruitment needs. There are several advantages to creating your plan, among these are:

- The act of creating your outline plan clarifies and defines the project, its dependencies, inputs, and deliverables.
- The outline plan is used to gain the commitment of the most important stakeholders and their authorisation for the use of resources; time, people, and money at key stages of your project.
- The outline plan provides a valuable overview of your project assisting communication within and outside the project.
- The outline plan aligns your planning and preparation with the ability to lead and manage your project to a successful conclusion.

The outline plan in chapter 2.3 of *A project leader's guide to Recruitment and Selection* can be the basis of the plan in your PID.

2.4 The Governance Structure

Recruitment projects need approvals, reviews, and decisions — this is the purpose of governance. The governance structure identifies the key stakeholders, their role, and responsibilities within the project.

Because the PID lasts for the duration of the project, it is helpful for the first project board meeting to review the PID and authorise it. Signatures of the key individuals (including yourself) authorise the PID and bring the project into being.

Note: Signatures on the front-page of a PID is a highly visual way of depicting commitment.

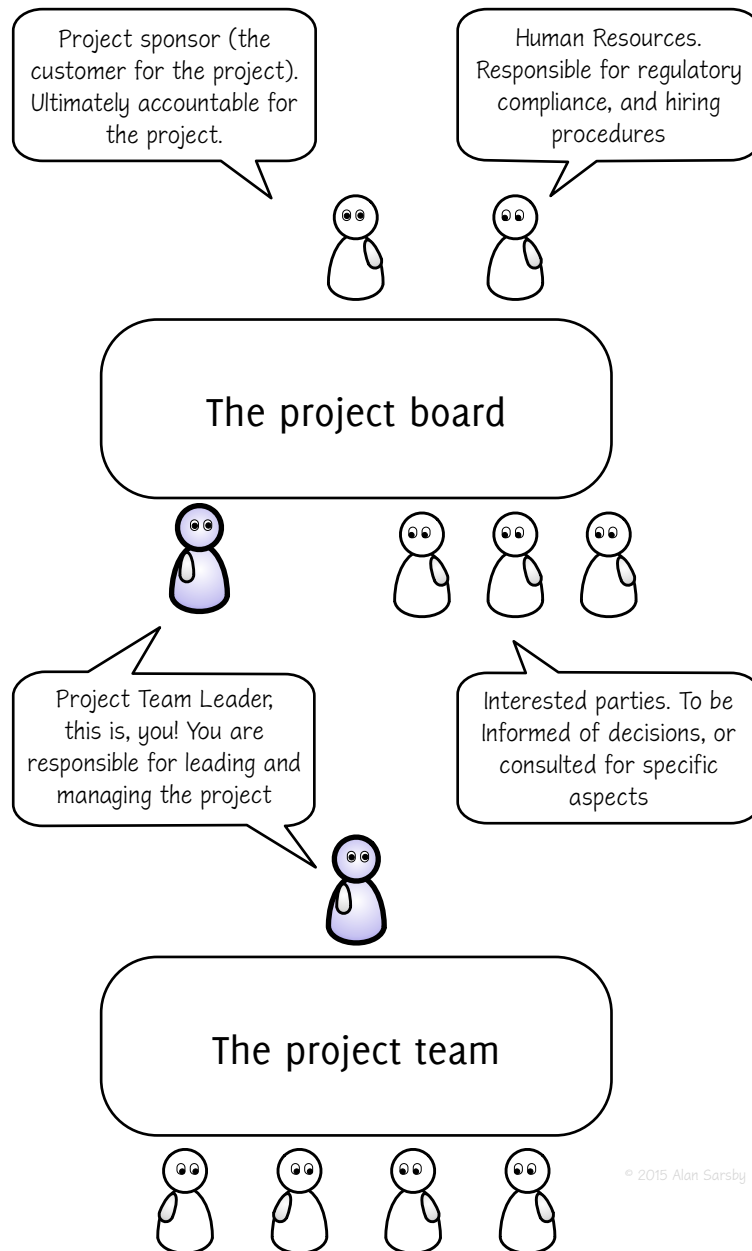


Figure 2 — A typical governance structure

2.5 Clarity of the project’s deliverables

A deliverable is what your project produces using the resources. Projects typically have two types of deliverable:

- **Enabling deliverables** are necessary for the project to proceed, and
- **Ultimate deliverables** are the outputs and outcomes from successful achievement of the project objectives.

The PID records a brief description of the deliverables. Write these as a tangible object with an accompanying statement of its benefit or where it is used.

Typical deliverables from a recruitment and selection project are shown in the tables following:

Enabling deliverables	Benefit
<ul style="list-style-type: none"> ▪ The PID 	The PID is the primary document authorising your recruitment project
<ul style="list-style-type: none"> ▪ Job specification — the functional definition and requirements of the vacancy 	Created during the role analysis for use with the vacancy marketing, assessment design, paper-sifting, candidate assessment and evaluation
<ul style="list-style-type: none"> ▪ Person specification — the characteristics and behaviours required of the person who performs the functional role 	Created during the role analysis for use with the vacancy marketing, assessment design, paper-sifting, candidate assessment and evaluation
<ul style="list-style-type: none"> ▪ Assessment design — the design and compilation of activities to compare the individuals against the job and person criteria 	Used during the assessment to get the best out of the candidates, ensuring all candidates are assessed equitably.
<ul style="list-style-type: none"> ▪ Evaluation grid — weighted recording method enabling comparison between candidates 	Evaluation of candidate performance, comparison of individual candidates across a range of criteria to aid selection.

Ultimate deliverables	Benefit
<ul style="list-style-type: none"> ▪ Best Candidate appointed 	Best available person is selected, recruited, and appointed to the role by the target date.
<ul style="list-style-type: none"> ▪ Candidate — performance and assessment record 	Performance record can be very helpful to the line manager to inform the Induction and orientation programme plus planning and monitoring any training and development.
<ul style="list-style-type: none"> ▪ Project Review 	A post project review to harvest any organisational learning: identify improvements and what should be re-used in future recruitment and selection projects.

2.6 Keep your stakeholders engaged: Reporting and monitoring

A short statement in your PID declares how, and when, your project is to be monitored, kept on track, and what reports are to be created. This should set and manage the expectations of your key stakeholders and those involved in your project. It also provides others with the opportunity to request information and know where that information is available.

Regular exchange of information with key stakeholders and those involved in the project might seem time-consuming, however those reports and updates ensure the availability of scarce or additional resources for your project when changes occur or if the need arises.

2.7 Recognising and dealing with risks

All projects have risks to their success. The purpose of identifying key risks in the PID is to demonstrate awareness so you can build in contingency and plan/design to avoid risks

The risk section of a PID contains a short and reasonable summary of the risks to your project. Focus on those risks that have a higher impact, for example:

- Where unusually high costs might be encountered, for example to advertise the vacancy might require a substantial budget.
- The availability of specialists to undertake role analysis or assessment design (for example, you might have to contract an external consultant to train your team).
- The loss of a key stakeholder or changing priorities that impact your project.
- Potential brand damage if the project is not conducted in line with corporate values.
- Timeliness is always a risk in recruitment and selection. Scarce talent is likely to be recruited by others, for example your competitors. If there are delays in the project, or poor communication at key points, especially the time gap between interview and the job offer being made your best candidate might go elsewhere.

2.8 Identifying project resources

Your project requires resources. The top three resources are people, time, and money. You also need methods/expertise (such as assessment design skills) and mechanical resources (such as conference rooms, projectors, and flipcharts).

Leading and managing your project resources is essential to the success of your project. A tabulation of when resources are needed can aid in convincing sceptical stakeholders. Remember a PID is succinct so avoid the temptation to go into great detail.

2.9 Learning: Project evaluation and review

The purpose of a final review before closing your project is to:

- Evaluate the successful conclusion of that project.
- To recognise individual contributions.
- Record what worked and what could be done differently.

The PID should include the final evaluation and review as a deliverable, and allocate resources to achieve it.

You might also like to specify how the results of review are to be promulgated.

2.10 Project closure

Project closure is the final act of the project board. Closure includes the hand-over to the line manager, communicating and celebrating the team's success, and the presentation of organisational learning from the review.

The PID should record the expectations and resources needed for project closure.

The Leadership Library

The leadership library is a collection of works addressing business activities from the standpoint that success arises from understanding the different qualities of leadership and management, and that a balanced application of both gives success. The titles are based on the real-world experiences of the authors.

A project leader's guide to Recruitment and Selection is a 114-page book guiding you through a project-based approach so you can lead and manage a recruitment and selection project to a successful conclusion. The guidance includes:

- How to design the job and person specifications.
- How to design the advert and marketing materials.
- How to design assessments, questions, and interviews.
- How an applicant centred approach to bring out the best in candidates and make your assessment easier and equitable.

How to create a Project Initiation Document for Recruitment and Selection is a companion document to *A project leader's guide to recruitment and selection*.

This resource elaborates on content in the book with more detail enabling you to create a high-quality Project Initiation Document, so that your job of a project leader is easier and more successful. This document has been downloaded from the Leadership Library.

Further help from the authors.

The authors are happy to consider requests for training, seminars, or project mentoring.

Please contact: editor@leadership-library.co.uk



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