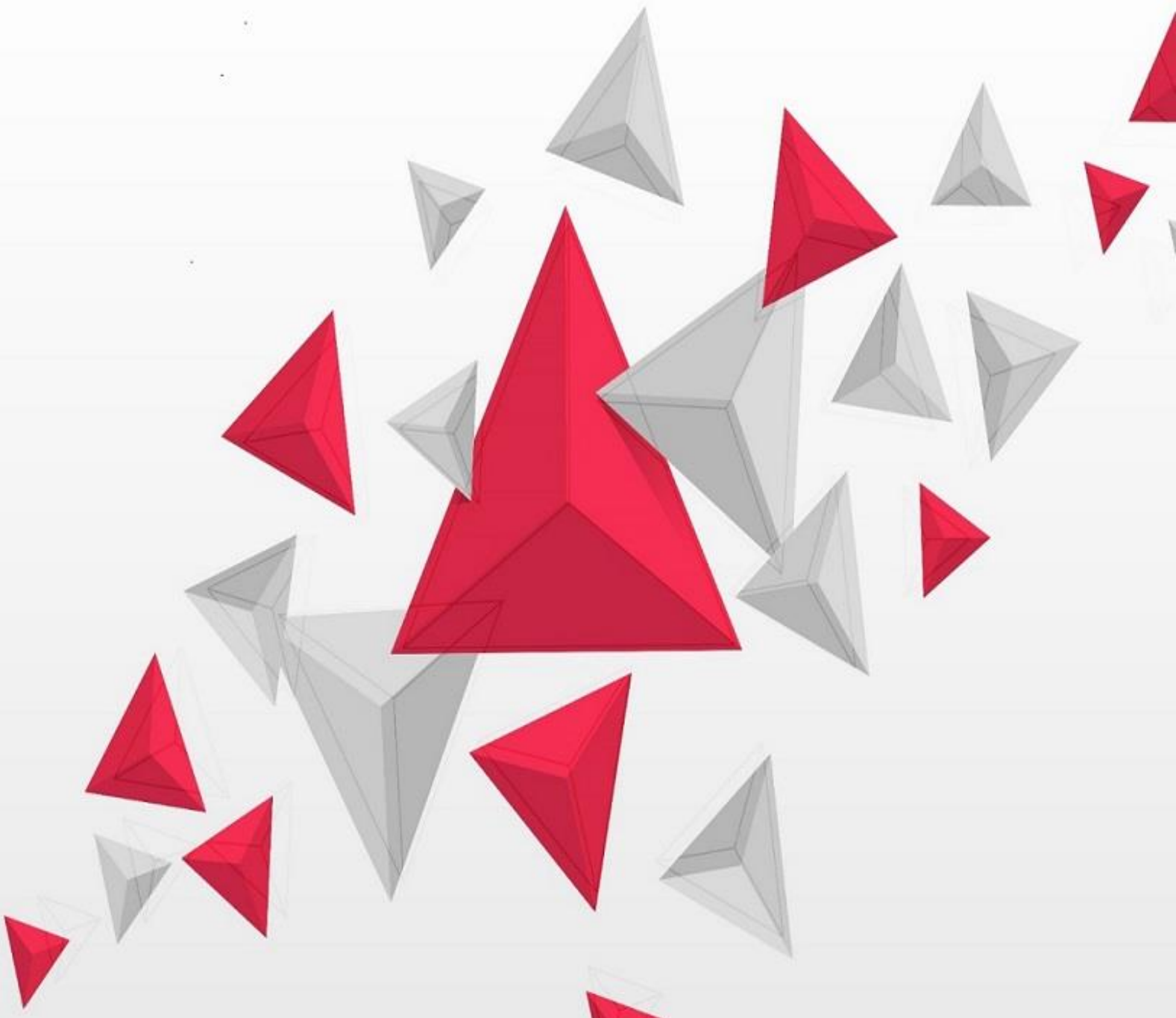


Project Vision Document

Guide Book





PROJECT VISION DOCUMENT – INTRODUCTION

The project vision document is usually one of the very first documents that a Business Analyst authors in the life-cycle of a project irrespective of whether the project is being developed iteratively or incrementally.

Vision is defined as the 'capability to plan the future with both imaginations as well as wisdom.'

Similarly, a *vision document is a fundamental project document that defines and describes, on a high level, the very reason the project is being undertaken, what problem it will solve, and what the high-level scope of the project is.*

To help you get a fair amount of idea of what a Vision Document is all about, let's take a quick example - If your project is to, let's say 'Buy a Car,' then your vision document will contain answers to questions like:

- Why do you need a car?
- What problems will be solved by buying it?
- Will your family be using it?
- What features would you like the car to have?
- What will be its price range?
- What limitations you might experience while trying to buy a car

Understanding better already? Great, let's move ahead. I have divided this document into 4 logical sections for better comprehension, and the first section that we are now going to discuss is Aspects or features of a Vision Document.



ASPECTS OF A PROJECT VISION DOCUMENT

1. The project vision document is created from a stakeholder's perspective, which means how the stakeholders see the product and what problems they are seeking to resolve by its implementation.

As a quick refresher, the definition of stakeholder is 'somebody who is positively or negatively affected by the outcome of a project.'

To understand this point better, look at the previous example where you were buying a car. If you notice, all the questions were asked from your viewpoint, i.e., the stakeholder's perspective. Like why '*you*' want a car, what features '*you*' would like to have, and limitations '*you*' might experience.

Get the drift?

2. The project vision document **gives a high-level answer to the "why and what" of the project** and not "how".

Thus, the Vision Document will not tell us the technical solution towards building a product, and in our example, it will not contain how you will buy the car, i.e., through a car loan, a partial payment, or full payment.

3. The Vision document contains:
 - justification of the need for the project
 - the stakeholders involved
 - the user-related details
 - the overview of the product and its features
 - the assumptions
 - and the constraints

Thus, this document is an excellent communication tool that gives everybody a common, unified picture of the project's goal in the early stages.

4. The language and information contained within the vision document are general enough that all the associated stakeholders ranging from higher management to developers can understand it *and*; detailed enough that all the future decisions against the project can be validated against what is written in this document.
5. **A signed-off and baselined project vision document are referenced throughout the project's life cycle.**

For example:

- To gain an initial project understanding while creating system requirement specification, function requirement specification document, or similar specification documents.
- To judge the viability of any new suggestion
- To request for a new feature's inclusion from the stakeholders
- To bring all parties to a common consensus in case of any ambiguity or disagreements



AUDIENCE OF A PROJECT VISION DOCUMENT

In this section, we will talk about the different types of stakeholders that will be using the baselined project vision document and their respective purposes:

1. The **Higher Management**, i.e., the CFO, the account head, and the likes, will use this document to approve the project funding.
2. The **Client Sales Team** will use it for marketing the product and pitching the features to prospective clients
3. The **Project Manager** will use it to define the project scope, schedule, constraints, and other project plans.
4. The **Development Team** will use it to align their technical solution with the product features
5. The **Business Analysts** will use it to validate the modules, functionalities and refer to them while detailing the particular product features.
6. The **3rd Party Stakeholders** will use it to elevate their overall understanding of the product being developed.
7. The **Quality Team** will use it to learn about the acceptance criteria and quality expectations from the final product.
8. The **Audit team** (whether external or internal) will use the document to get a high-level idea about what is being achieved by the successful execution of the project

With almost all the project stakeholders referring to the same document, the chances of scope creep are significantly reduced and, in turn, will positively impact the overall project success.



HOW TO CREATE AN PROJECT VISION DOCUMENT

The project vision document is usually created by a Business Analyst (and sometimes by a Project Manager) by collaborating with other client stakeholders like the product owners, business leaders, technology heads, competency leaders, and the likes.

Let's proceed in a step-wise fashion to understand it better.

STEP 1

Usually, a client, i.e., 'an organization who wants to build the product,' comes to a vendor, i.e., 'a service provider who will be building the product' with a concept, statement, or rough draft of the Vision document.

Now, a Business Analyst and a Project Manager are engaged to detail out the concept in the form of a document.

STEP 2

The business analyst facilitates a meeting containing the client representatives from all the associated and impacted verticals/groups/areas (if they are available), and if they aren't available, then identified product owners or SPOC.

STEP 3

In the meeting, the product purpose, requirements, features, scope, assumptions, and limitations are discussed, questioned, clarified, and documented by the business analyst.

It is advisable to have as many client stakeholders as possible in this meeting to gain an agreement on the high-level project features and overall solution.

This discussion is usually carried on for 3-4 meetings or sessions before Business Analyst has enough details to start working on the vision document. Also, the business analyst should limit the context of the conversation to "why and what" and should refrain from discussing the "how" of the project.

STEP 4

Post-meeting, the business analyst and the project manager work on expanding the various sections of the project vision document based on the details elicited from the product owners and other stakeholders.

This document, along with any supporting artifacts like 'meeting notes' and 'business flows' is circulated internally, i.e., within the organization for review and approval. Review meetings are set up to approve the vision document collectively if required.

STEP 5

Once internally reviewed, the document is then shared with the client for a final review and sign-off. The client requested amendments, and changes are incorporated as needed, and the signed-off document is then 'baselined'.

This baseline document is used to create another set of project initiation documents such as Statement of Work (SOW)* and/or Project contract document and/or Master Service Agreement (MSA).

The vision documents act as the guidepost and align all the activities from project kick-off until project *closure*.

Lastly, let's see some of the best practices that should be considered while creating a vision document.



PROJECT VISION DOCUMENT - BEST PRACTICES

The vision document should not be excessively lengthy. I have sometimes seen that vision documents are enormous and contain as much information about the requirements as the business/functional requirement documents. Although having all that information in the vision document does not hurt but seems out of place for sure.

Use your judgment to decide whether the project vision document is crisp enough to be read in a single sitting, yet comprehensive enough that it contains all the required information.

If you are still looking for a ball-park figure, try to restrict the complete document within a limit of 15 pages.

Next, I would suggest you refer to the Project Vision Document Template to know in detail about the various sections that go into this document.