EXPRO National Manual for Projects Management

Volume 3, chapter 1

Project Initial Planning Introduction

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Table of Contents

1.0 INTRODUCTION

Once an infrastructure project has been registered online via the Expro Projects Dashboard, assigned a formal Expro project registration number, and once it has passed Stage Gate 1 Review, it is permitted to proceed to Stage 2 - *Initial Planning.*

A 'preferred' project site, on which ongoing conceptual planning and design development (i.e. concept master planning) is to be undertaken, would have been selected by the entity during its up-front 5-Year Projects Portfolio Planning stage.

The primary objective of this stage is to further plan, develop, test and refine the initial project parameters established during the 5-Year Projects Portfolio Planning stage. This will help establishment a well-defined 'basis of design' and other essential information required for a formal Stage 2 Gate Review, whilst also ensuring a reduction in potential project planning and design related risks. Key information to be developed, prepared and submitted for review at the end of this stage, would include (but not be limited to) the following:

- Early identification and engagement with key Stakeholders;
- Multi-disciplinary assessment of the project site, surrounding context and regulatory frameworks;
- Generation of Conceptual Master Plan Options;
- Confirmation of an Entity preferred Concept Master Plan Option;
- Establishment of an integrated, multi-disciplinary 'Basis of Design Report';
- Preparation of a Class 4 (*Order of Magnitude*) project Cost Estimate;
- OPEX Estimation (refer to section 6.3.2 in Volume 16 Chapter 1)
- Formation of a Level 1, Project Schedule;
- Preparation of an Outline Business Case (OBC);
- A strategy for the Acquisition of Land;
- Establishment of a Project Permitting Plan, and
- Clarity on how the project is to be delivered, via a Project Delivery Strategy.