

Project Definition Checklist

A project definition checklist can help you to determine whether your project is defined properly and whether you are ready to proceed to the next iteration of detailed planning. If you find that your project is not properly defined, you have the following options available:

- Resolve any gaps with appropriate stakeholders before moving onto next phase
- If the project has already been defined, work to resolve these gaps during the detail planning phase.
- If gaps cannot be resolved, then handle as project risks or issues (whichever is appropriate for the specific gap).

General

- Is it clear why this project is being undertaken?
- Is there a clear picture of the desired results of this project?
- Is there a clear picture of how this project fits within the organizational landscape?
- Is there a gap between available and needed funds?
- Have the success factors been identified? Are they complete? Are they SMART?
- Have any future state performance targets been defined as success factors? Are they SMART?
- Is the gap between the current state and the desired future state clearly documented and understood?
- Has the expected “change” impact on existing business processes, customers, systems, and staff been clearly documented?
- Do you understand who is funding the project initiative?

Scope

- Does project scope indicate boundaries among impacted processes, systems, and organizations?
- Is the project scope defined clearly enough to show when scope creep is occurring?
- Have any external process or system interfaces that will be impacted by this project been identified?
- Has the process workflow between business units or business functions been properly considered?
- Have the organizational and geographic boundaries been clearly defined?
- Does the project scope include related items that are out of scope?
- Does the project scope include any other organizational or technology-based initiative that is needed to fully support the project objective?

- If the project scope includes any requirements, have the requirements been properly validated?
- Have any and all project constraints been identified?
- Have any and all project assumptions been identified?
- Are there any known policies, regulations, or standards that apply to this project (such as procurement, quality, security, regulatory compliance, and so on)?

Stakeholders

- Has the project sponsor been identified and engaged?
- Is each affected business unit and business process step presented on the project team?
- Is each customer group represented on the project team?
- Are all stakeholders identified in a project organization chart?
- Are the reporting relationships indicated in the project organization chart?
- Are project roles described and assigned to each stakeholder?
- Have we identified which stakeholders form the core management steering committee?
- Have you identified which stakeholders need to review and approve any requested changes to the project definition?

Project Approach

- Does the recommended approach explain why it is selected over the alternatives?
- Are the proposal technologies, strategies, and methodologies documented?

Other

- Are the project definition elements documented?
- Is the project definition document under configuration management (version control)?
- Have high-level risks and planned responses been identified?
- Have the preliminary timeline and budget been stated? Are the supporting reasons and assumptions documented?

Acceptance

- Have all the stakeholders reviewed, agreed upon, and approved the Project definition document?
- Have the project manager been officially authorized?