PROJECT SCOPING CHECKLIST

STAKES

☐ Is the project a high priority for the organisation?
☐ Does the Board and C-suite have a strong interest in a successful outcome?
☐ What are the consequences if the project doesn’t succeed?
☐ Will the project be competing with others for resources and prioritisation?
☐ Does the project need to happen now?

CLARITY

☐ Are the project objectives clear and directly aligned to corporate strategy?
☐ Have you chosen a method for scoping activities, deliverables, timeline and budget that is appropriate to the nature of the project and internal capability e.g. external help has been considered if necessary?
☐ Has the defined scope been independently tested by someone independent of the scoping process?
☐ Are project governance arrangements and a consultant selection process and criteria in place?
☐ Has an RFP been completed for release to potential consultants and if so, does it include all necessary background and context as well as requirements sought from bidders?

OWNERSHIP

☐ Has a sufficiently senior project owner been identified who has the passion and personal “skin in the game” to lead and drive the project to a successful outcome?
☐ Does the project owner have enough power to secure or retain resources outside the project’s boundaries if that becomes necessary?
☐ As a senior executive, has the project owner genuinely freed up the necessary amount of time to commit to the project e.g. 2 days minimum per week?
☐ Does the project owner have the personal style and internal respect to lead and motivate both the internal project team and external consultants?
PEOPLE

☐ In addition to scoping the resource allocation needed for external consultants, is there a realistic estimation of the internal resources needed to work on the project?

☐ Have high quality people from within the organisation who are keen to work on the project been identified and secured?

☐ Is the method for back-filling BAU roles of these staff members clear and has any external cost e.g. employing contractors, included in the project budget? (This is particularly important for anyone being assigned to the project on a part-time basis.)

☐ Does the project budget include a realistic allocation for internal direct costs e.g. travel and accommodation?

EXPECTATIONS

☐ Have you selected a consultant with whom you are completely comfortable and believe that the arrangement struck is fair to both parties?

☐ Are you confident that the people committed by the consultant, particularly the most senior ones with the deepest expertise, genuinely have the time availability to commit as expected?

☐ Are communication protocols in place for regular reporting and feedback with the consultant (in both directions) and does this include the facility to amend scope on a mutually acceptable basis if the project requires it mid-term?