

Project readiness checklist

Before we begin

You do not need every answer before contacting us. Check what you know, add brief notes, and leave anything uncertain for discussion. This is a conversation aid, not an eligibility test or a project commitment.

01 Define the outcome

- ☐ Name the process or task you want to improve.
- ☐ Describe the delay, repeated work, or problem it creates.
- ☐ Identify what a useful result would look like.

Your goal and how you would recognize success

02 Describe the process

- ☐ List the main steps, from the starting event to completion.
- ☐ Note who handles each step, approval, and follow-up.
- ☐ Identify common exceptions and roughly how often the work occurs.

Key steps, bottlenecks, or exceptions

03 List the tools and information

- ☐ List the software, spreadsheets, forms, and records used today.
- ☐ Note where the same information is entered more than once.
- ☐ Identify available licenses and examples that can use sample data.

Current tools, information sources, and known gaps

Use general descriptions or fictional examples. Do not enter passwords, personal records, payment details, or confidential client information.

Project readiness checklist

People, priorities, and next steps

There is no minimum score or required number of completed items. Use these prompts to make the next conversation useful.

04 Identify people and access

- ☐ Identify who will use the solution: staff, customers, or partners.
- ☐ Note who should view, create, change, or approve information.
- ☐ Identify the decision-maker, process owner, and access administrator.

People, permissions, and information-handling needs

05 Set priorities and constraints

- ☐ Separate what is essential for launch from later improvements.
- ☐ Note any target date and why it matters.
- ☐ Identify budget guidance, dependencies, and specialist input needed.

Must-haves, timing, budget guidance, and dependencies

06 Plan review, handover, and support

- ☐ Identify who can answer questions and test the solution.
- ☐ Describe the training, documentation, and support you may need.
- ☐ List open questions and anything you want help deciding.

Review participants, support needs, and open questions

Next step: bring these notes to a project conversation. Begin with a short description through Discuss Your Project. The inquiry form does not accept attachments; we will arrange further sharing if needed.