Project set-up checklist: Confirm that the right teams are in place

For medium-sized organisation projects involving external software providers (SaaS or customised), spanning multiple work areas, and requiring a consultant analyst for business analysis and planning.

1. Project objectives and business justification

Requirement	Explanation	Check
1.1 Clear business objective	The project addresses a defined problem and has defined objectives.	
1.2 Clear scope	Processes within and outside scope are defined.	
1.3 Defined business value	The expected benefits are defined and justify the expected investment.	

2. Identify key stakeholders

Requirement	Explanation	Check
2.1 Affected business units identified	All work areas within project scope must be included	
2.2 Departmental heads identified	Leaders with accountability for each process area.	
2.3 Senior users identified	Individuals with operational expertise who can explain workflows and current-state issues.	

3. Governance Team – Strategic ownership and oversight

Requirement	Explanation	Check
3.1 Sponsor appointed	A senior executive (e.g. CEO or COO) is accountable for project success and business alignment.	
3.2 Senior user representation	Senior managers with operational oversight for all process areas.	
3.3 Product or service leader	If scope covers product or service delivery, the executive responsible for customer satisfaction.	
3.4 Consultant analyst is engaged	Expert analyst who can plan and lead requirements development under supervision of governance team.	
3.5 Other stakeholders considered and included as needed	For example, IT Director, Legal Director, HR Director.	
3.6 Convenor or coordinator appointed	Support and documentation for governance team.	

4. Requirements Team – Discovery, Validation and Input

Requirement	Explanation	Check
4.1 Consultant analyst is available	The consultant analyst has appropriate time, access, and mandate to lead the requirements work.	
4.2 Senior users assigned	Senior, expert users assigned to cover all processes within project scope.	
4.3 Line managers consulted	Process owners who ensure requirements are operationally sound and feasible.	
4.4 Selected front-line staff included	Input sought from selected frontline staff to test assumptions, identify exceptions, and ground requirements in real work.	
4.5 IT advisor available	IT advisor provides feasibility input without directing solution scope.	

5. Check for key risks

If the answer to any question is contrary to that expected, review the project before proceeding.

Risk assessment questions	Expected	Answer
5.1 Is there a clear, written statement of project objectives, scope and expected business benefits?	Yes	
5.2 Does the project executive or sponsor have sufficient authority to enforce cross-functional engagement by all stakeholders?	Yes	
5.3 Is the executive actively engaged and invested in project oversight?	Yes	
5.4 Is there a defined process in place for development of a business case?	Yes	
5.5 Have all leaders and line managers of affected work groups been consulted and included in planning?	Yes	
5.6 Are you relying on the solution vendor to elicit business or functional requirements?	No	
5.7 Does the requirements team rely on junior staff to define or validate business needs?	No	
5.8 Has the consultant analyst provided a documented plan outlining the approach to requirements discovery and validation?	Yes	
5.9 Are there clear agendas for project meetings and workshops?	Yes	