Digital Transformation Project Health Checklist

Project Organization

- Who is the project sponsor, and where do they fit in the organization?

  _____

- Is the sponsor empowered to make key decisions?
  - ☐ Yes   ☐ No

- Does the project steering committee include:
  - ☐ Executive Sponsor
  - ☐ IT Leadership
  - ☐ Project Management
  - ☐ Business Stakeholders & Subject Matter Experts

- Is there a project steering committee that includes executive-level oversight?
  - ☐ Yes   ☐ No

- Is there a Project Manager or PMO who is accountable for the project?
  - ☐ Yes   ☐ No

- Is there adequate active business user participation on the project working team?
  - ☐ Yes   ☐ No

Business Proposition

- Are there clearly defined business objectives?
  - ☐ Yes   ☐ No

- Is there a documented business case?
  - ☐ Yes   ☐ No

- Are there measurable benefits?
  - ☐ Yes   ☐ No

- Have unknowns and risks been documented?
  - ☐ Yes   ☐ No

- Is there a contingency built into the business case to account for unknowns?
  - ☐ Yes   ☐ No

- Is there executive-level and business user agreement and support for the business use case?
  - ☐ Yes   ☐ No

Scope Control

- Have the requirements been documented?
  - ☐ Yes   ☐ No

- Is project scope tied directly to the delivery of documented requirements?
  - ☐ Yes   ☐ No

- Have the requirements been signed-off on by executive sponsor and key business users?
  - ☐ Yes   ☐ No

- Is there a documented process for updating requirements and project scope?
  - ☐ Yes   ☐ No

Project Work Plan

- Have all tasks been identified and estimated, at least at a high level?

  ☐ Yes ☐ No

- Have interim deliverables been identified for project tasks?

  ☐ Yes ☐ No

- How were tasks estimated and were estimated guidelines used?

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  _____

  _____

  _____

- Have the necessary project lead times been planned for?

  ☐ Yes ☐ No

- Have task dependencies been identified, and are they being actively tracked?

  ☐ Yes ☐ No

- Have vacations, holidays, etc., been incorporated into the project plan?

  ☐ Yes ☐ No

- Have contingencies been built into the plan for estimations on errors, learning curve, unplanned activities, unanticipated delays, etc.?

  ☐ Yes ☐ No

Project Team Skill Sets

BUSINESS/PROCESS SKILLS

- Is there an appropriate allocation of the Subject Matter Expert's time?

  ☐ Yes ☐ No

TECHNICAL

- ☐ Architecture Development
- ☐ System Development *(Design, DBMS, Application Programming, etc.)*
- ☐ Familiarity with System Components
- ☐ Maintenance and Support

TRANSITION

- ☐ Project Marketing and User Preparation
- ☐ Project Communications
- ☐ Training Development
- ☐ Training Delivery
- ☐ Implementation/Rollout Planning & Delivery

ADMINISTRATIVE

- ☐ Management
- ☐ Financial Control

Project Control

- How often is the project plan updated?

  _____

- Are tasks tracked and updated at least weekly?

  ☐ Yes ☐ No

- How are project team members held accountable for tasks and deadlines?

  _____

  _____

- Is there an actively managed issue log?

  ☐ Yes ☐ No

- Is the project budget reconciled at least monthly to the project plan?

  ☐ Yes ☐ No

- How frequently are...

  - Project Team Meetings held? *(suggest weekly)*

    _____

  - Written Status Reports produced & distributed?

    _____

  - Project Sponsor Reviews conducted?

    _____

  - Reviews held with key Business Users?

    _____

  - Executive Reviews conducted?

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