

# RB Consulting, Inc

## Project Kickoff Checklist

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## Overview

The goal of this document is to layout a checklist for a project kickoff. This will cover tasks that need to be done in order to build an RFP or create an estimate. IT projects fail at an alarming rate and the hope is that starting on the right foot will improve the likelihood of success.

### Project Failure Rates:

<\$350K budget:  
20%

When you look at the top three reasons project fail according to Gartner (<https://thisiswhatgoodlookslike.com/2012/06/10/gartner-survey-shows-why-projects-fail>) planning is critical to success.

\$350K to \$1M budget:  
25%

Those three failures reasons? High cost variance, Substantially Late, and Functionality issues. We will try to address those from the start through spending time early in the project on design and decisions.

>\$1M budget:  
28%

When this checklist is complete we will know the following about our project.

- Business goals
- Key stakeholders and subject matter experts
- High Level User and Functional requirements
- Budget limitations
- Target Audience
- Problems to be solved by the project
- Risks
- Key Milestones and deliverables
- Related regulations to comply with
- Special Considerations (security, documentation, training, etc.)

This may seem like a daunting list, but these are all items that will be addressed sooner or later during a project. Of course, later may come after the solution launch and can be catastrophic. Examples include ZapMail from Federal Express, Euro Disney, and Apple's Copland Operating System.

## The Checklist

Now that we have looked at the goals, we can jump to the checklist. Items are described in further detail later in this document.

- Business goals
- Key stakeholders and subject matter experts
- High Level User and Functional requirements
- Budget and limitations
- Timeframe
- Problems to be solved by the project
- Identify Risks
- Target Audience
- Milestones/Deliverables

Addressing each of these items is key to project success. These will help us define and communicate our vision.

### Business Goals

Get specific. When you check off this step you should have an easy to understand set of goals that make sense to your business. These are requirements for the project and not things that “would be nice to have.”

### Identify Stakeholders

Who makes the decisions for this project? Where does one go to get answers about how things should work or what the users expect? Create this list of contacts and ownership to make it clear what role everyone plays and who to contact to get needed answers.

### High Level Requirements

This should follow from the business goals. Sample screens are nice, but functionality is critical. This is where you list out the steps involved in any included processes. The list should include references to any regulatory requirements (HIPPA, PCI, etc) and include expected results.

### Budget

Decide on a budget in time and money and how critical it is to make that budget. This should be done as early as possible in the project as it will open and close doors for getting the project done. It is an important part of setting expectations for yourself and the implementation team.

## **Timeframe**

This is an important part of setting expectations. Whether deadlines are “hard” or “soft” they need to be set. The implementation team also needs to know what deadlines are “hard” (the company will cease to exist if this deadline is not met) or “soft” (we would like to hit this date, but it is arbitrary and slipping a month will have no noticeable effect on the success of the project). The details from this step can also be used to adjust budgetary items in some cases so it goes hand in hand with that step.

## **Target Audience**

Who will be using the end product? Include estimates of numbers, frequency of use and both technical and business knowledge the users will have. This information combine with the budget to set expectations for all involved. It also can help scope in or out features like online help, user manuals, training, and other “optional” pieces of any project.

## **Problems This Solves**

Project success or failure comes down to solving problems. Any project should start with a focus on the problems it solves for the users. If this step has not been taken then it is impossible to know if the end product is a success or a failure. When a project does not solve a problem then it should not even be started. It is doomed from the start and a waste of resources.

## **Identify Risks**

Once the budget, target audience, and requirements are laid out there will be some project tasks that are easily accomplished. These are tasks that have been done before or are well documented. However, there will be tasks that are new, require research, or have a low chance for success. These risky tasks need to be identified as they are the ones that will most impact success or failure. Ideally, the highest risk tasks are front loaded in the project plan so the likelihood of project slippage (or failure) is determined early and losses can be limited.

This extends to tasks that have a wide range of time estimated for completion. The early or late completion of such tasks can significantly impact deadlines. When possible, get a proof of concept done for these high risk items to help reduce the risk of slippage and failure.

### **Milestones/Deliverables**

Last and not least, set milestones and deliverables. This is where the project gets broken down into easier to manage chunks. The expectations for the implementation are defined in this step. This step should include participation from the implementation team to at least provide some realistic time and deliverable estimates. This is where the tasks the implementation team will be held to are defined so it makes sense that they should provide input. If this step does not include the implementation team then be aware that the estimates they provide may not fit the budget.