



Sponsor Checklist - CONCEPT

What to Expect:

During the CONCEPT phase, the Sponsor is the key driver of the project vision and he or she begins to shape and articulate the goals and desired outcomes for the project. You should plan to have discussions with your project manager and change manager to describe the project goals, risks and benefits. If you have been recruited to sponsor a project, you should make sure you have similar conversations to level set expectations and goals.

Also, if you are new to sponsorship or are sponsoring a technology project and do not have significant technical expertise, it is helpful to begin recruiting “trusted advisors” who have subject matter expertise in key areas to provide you with advice and perspective during the project. These individuals may become part of your steering committee once the project begins.

Preparation and Key Questions:

- Understand the business strategy of your organization and how your project relates to it;
- Have a “portfolio view” of how other projects may affect yours and what additional, complementary efforts might be required to achieve the desired outcomes of your project;
- Understand the value of your project and how to define it as one that has value;
- Be ready to make recommendations to protect its value;
- Know what to do, why, when and how, at each important phase of a project to protect your project’s value (this is an area where a panel of trusted advisors can be helpful)
- Use your executive confidence and skills to deal with problems and risks as they emerge.

Key Actions:

- Hire or meet with your project manager (PM) and change manager (CM) and discuss business benefits of project.
- With the support of your change manager:**
 - Develop vision statement.
 - Define and document the desired business outcomes for the project.
 - Complete readiness assessment and project risk classification.
 - Begin crafting messaging around your project.
 - Begin lobbying for executive support from your sponsor coalition through targeted discussions on the business value of the project.
- With the support of your project manager:**
 - Define the project scope.
 - Complete the business case (with the support of your trusted advisors or Steering Committee).
 - *Make sure the business case articulates at the outset, what the desired business outcomes are, in clear precise, specific unambiguous language*
- In conjunction with both the change manager and project manager:**
 - View lessons learned and discuss how to apply lessons learned forward.
 - Sign off on any deliverables requiring your approval.