Sponsor Checklist - INITIATE

What to Expect: During the INITIATE phase, the Sponsor takes the lead in establishing the goal and tone of the project. You should expect to recruit additional parties for your steering committee and/or panel of trusted advisors and leverage their expertise in fulfilling key actions in the phase. You will also approve the project to commence via the project charter and participate in a limited fashion in helping the project manager and project team identify risks, dependencies, and assumptions. Last, you will begin carrying the project message to employees and managers to generate early awareness.

Preparation and Key Questions:

- Understand why your project's value proposition is so crucial to success;
- Understand and define what the start and end points of your project should be (how do we now when it's done?);
- Understand the difference between opportunity scope and solution scope and why that matters to your project;
- Understand how IT projects are different from other types of projects and therefore what additions you may need to make to balance the management of the project;
- Be able to distinguish value in your project and understand how to optimize the value delivered in your project against the cost of delivery.

Key Actions:

- ☐ **With the support of your change manager:**
  - o Contribute to the sponsorship model (the model for who is responsible for obtaining business benefits).
  - o Contribute to the identification of stakeholders. As sponsor, you will be particularly interested in stakeholders who may be part of your "sponsor coalition".
  - o Discuss opportunities to engage with stakeholders and coalition members.
  - o Begin taking opportunities to speak briefly on the value and goals of your project.
- ☐ **With the support of your project manager**
  - o Convene your steering committee (SC) and review vision, scope, etc. with them.
  - o Assist the PM in charter completion (this may be simply a signature or it may require some additional definition of the project outcomes).
  - o Meet and vet the project team.
  - o Review the RACI as competed by the PM and project team.
  - o Review and agree to resource estimates.
- ☐ **In conjunction with both your change manager and project manager:**
  - o Contribute to the risk analysis. As the sponsor, you will be particularly interested in organizational risks and policy risks that may require your intervention.
  - o Participate in discussions on dependencies, constraints and assumptions. As the sponsor, you may play an integral role in helping to smooth over dependencies and constraints.
  - o Review and agree to a preliminary project work breakdown and schedule.
  - o Sign off on any deliverables requiring your approval.