



Sponsor Checklist – PLAN

What to Expect:

During the PLAN phase, the groundwork for conducting the project is established and the Sponsor plays a key oversight and guidance role. You should expect to refer back to the vision, project goals and business benefits frequently and to begin to execute the OCM sponsor roadmap. You should expect to vet the desired future state and make preliminary decisions on the general approach to the solution. You may be asked to contribute to the risk register or help mitigate risks and issues. Near the conclusion of PLAN, your project may develop an acquisition strategy, which will draw on your vision, goal and scope definition work. If an RFP is planned, you should expect to participate in the development of the RFP and selection of the contractor.

Preparation and Key Questions:

- Ask the right questions and assess the answers to ensure all is well;
- Evaluate answers/information that indicate an issue needs a decision or direction;
- Decide when to dig down into the detail and what the warnings signs are that tell when you need to do this (your trusted advisors may be able to assist in this);
- Decide what actions to take;
- Ensure that all of the activities required to realize value are systematically planned;
- Don't green-light the project to move forward unless you feel assured of its preparedness and clarity of purpose;
- Work with your trusted advisors and/or steering committee to help guide and protect the value of the project.

Key Actions:

- With the support of the change manager:**
 - Ensure business process reengineering has occurred to define the future state.
 - Discuss and agree to the defined future state (this may include stakeholders).
 - Define "measures of success" or key performance indicators to guide the project.
 - Review, understand and agree to the organizational change management plan.
 - Begin executing the communications plan.
 - Be active and visible with stakeholders, employees, the sponsor coalition and the project team.
- With the support of the project manager:**
 - Negotiate and agree to the project's completion criteria.
 - Review and approve the project plan.
 - Direct and agree the business requirements as processes.
 - Participate in developing (as feasible), review and agree to the solution plan/blueprint, including primary direction and alternatives.
 - If the work is being contracted, participate in the RFP development and agree to the presentation, participate in the bidder conference, and be an active member of the evaluation and selection team.
- In conjunction with both your change manager and project manager:**
 - Sign off on any deliverables requiring your approval.