Appendix 2

Additions to the Project Checklist following the Lessons Learned Review

Checklist Addition	Lessons Learned Recommendations
Project Idea Stage	
✓ Review the current provision and ensure that through negotiations with incumbent supplier, a better solution cannot be offered	Decision to procure
✓ Feasibility assessment to fully consider the impact, scale and complexity of the project	Decision to procure
✓ Options Appraisal – what options are being considered (to include a "do nothing" option)	Decision to procure
✓ Fully evaluate the Risk associated with the idea	Robust Procurement Process
✓ Ensure robust and compliant procurement process	Robust Procurement Process
Project Initiation Stage	
✓ Scope of Works (Objectives, Vision, Deliverables are clearly detailed).	Governance - Project Ownership
✓ Supplier due diligence and Market Evaluation considering sector and complexity experience	Supplier
✓ Stakeholder Matrix (considering role and involvement in the project)	Governance - Project Ownership
✓ As-Is Process Maps	PM Recommendation
✓ *Specification / Requirements (including business rules) clearly prioritised and monitored for deliverability*	Robust Procurement Process Delivery - Requirements
✓ Benefits (Key metrics to be measured)	PM Recommendations
✓ Predicted budget	PM Recommendations
✓ Ensure the Project Board Structure covers representation for impacted business areas and suppliers (usually no more than 8 for complex projects)	Governance – Project Sponsor Governance – Project Board
✓ Ensure that Project Board and any subgroups have clear terms of reference	Governance – Project Board Governance - Subgroups
✓ Ensure the Project Board mandate clearly sets out roles, responsibilities and skills requirement	Governance – Project Board
✓ Robust Resource Plans to ensure consideration is given to adequately resourcing in line with complexity of the project (including roles, responsibilities and skills required)	Delivery - Project Manager Delivery - Resources
✓ Data migration strategy (if required)	Preparation - Data
✓ Testing strategy	Delivery - Testing
✓ Training Needs Analysis and strategy	Delivery - Training
Project Deliver Stage	
✓ Project Document Library, library structure and naming conventions, user access & permissions	Project Documentation

✓ Standard Project Board agenda items for embedded Project Assurance and Monitoring:
  o Highlight Report (progress updates, milestones)
  o Project Plan Review
  o Risk Register Review
  o Issues Log Review
  o Budget vs actual spend
	Risks, Assumptions, Issues and Decisions (RAID)

o Decision log	
✓ Embed standard project assurance and monitoring principles into subgroup meetings	Risks, Assumptions, Issues and Decisions (RAID)
✓ Data migration plan, mapping, reconciliation and monitoring reports (if required)	Preparation - Data
✓ Monitoring of requirements met	Delivery - Requirements
✓ Testing Plan and monitoring reports	Delivery - Testing
✓ Training Plan and monitoring reports	Delivery - Training
✓ Go-no-go assessment criteria and monitoring reports	Delivery – Go Live
✓ Go-live activities checklist (lists all activities in chronological order, dependencies, estimated duration – no decisions on the day)	Delivery – Go Live
Project End Stage	
✓ Lessons learned (mechanism for feeding back improvements)	PM Recommendations
✓ Requirements evaluation	Delivery - Requirements
✓ Benefits evaluation	Delivery - Requirements