Project
Info Gathering
Document

WHY USE THIS TOOL:
Technology is a great tool. But, for the Enterprise, it's only a great tool if it's solving a business problem. Use this Project Info Gathering Document to organize and list all the technology changes coming up ... And why they make great business sense!

HOW TO USE THIS TOOL:
Allot 90 minutes. Gather project team members (and/or those most knowledgeable about the upcoming change) in person or via telephone. Collaborate to complete the document to the best of your knowledge or ability.

Define the Current Business Problem:

SITUATION: Describe the CURRENT challenge or situation within the organization…

- What is the current pain or frustration?
- Why is this project / new technology / new process needed?
- What's "wrong?"

BUSINESS PROBLEM TO BE SOLVED: What is the main business angle of this CURRENT challenge or situation?

- What are the business reasons for this project? Examples: Are you behind your competitors? Are you losing money or customers? What else?
- Do you need to check in with other Subject Matter Experts or Senior Leaders? Do they have deeper insight into why the business needs to address this challenge?

NEW TECH OR PROCESSES: What technology or new processes have been identified as a solution?

- What technology platform or solution has been chosen to remedy the problem?
- Which processes will be explored for improvement?
- What else?

[COPY THIS SLIDE FOR ADDITIONAL PROJECTS OR RELEASES]

Define the Future State:

GENERAL FUTURE STATE: Describe what the FUTURE looks like once the new technology / process is running smoothly…

- What will the future hold?
- How does the business run?
- How does it "feel" in the future?

GENERAL BUSINESS BENEFITS: Describe how the business will benefit in the FUTURE…

- List general business benefits: will you save money? Time? Become more efficient? More productive?
- Are there any larger, corporate-wide goals that your project is tied to?

[CHANGE TIP! Want to do a deeper dive into benefits? Try the Benefits-by-Audience Mapping tool to chart out benefits for Target Audiences affected by your project, broader business goal alignment and more.]

GENERAL EMPLOYEE BENEFITS: Describe how the general employee population will benefit in the FUTURE…

- List general employee benefits here: will their lives be easier? Faster? Smarter? Better? How? Why?
- List manager benefits here: will they be able to be more efficient? Effective? Better leaders? How? Why?

[CHANGE TIP! Want to do a deeper dive into your Target Audiences? Try the End-User Demographic Inventory tool to chart out who'll be affected by your project, where they're located, what their perceptions are, how to communicate with them and more!]

[COPY THIS SLIDE FOR ADDITIONAL PROJECTS OR RELEASES]

Define Communication Channels:

WHO: Who will need to know about the upcoming changes?

- Senior Leaders?
- Managers?
- End-Users?
- General Employees

WHERE: Where are these managers and employees located?

- Corporate?
- Offices?
- Remote locations / in the field?
- Manufacturing / plants?

WHY: Why should your managers or employees care about this project?

- What are the main project benefits for managers?
- What are the main project benefits for employees?

WHAT: What resonates with your employees from a communication standpoint?

- Posters? Email? Events? Contests? Brainstorm basic communication channels that are effective within your organization.

WHEN: When will you communicate? What's the general timeframe for this project?

- Kick-off:
- Testing:
- Training:
- Countdown:
- Go Live:
- Ongoing Support:

[COPY THIS SLIDE FOR ADDITIONAL PROJECTS OR RELEASES]

Define Competing Initiatives:

OTHER PROJECTS: Are there any other major business changes occurring right now?

- What other major projects are coming at your employees?
- What else is creating pressure or stress for employees?

MERGERS & ACQUISITIONS: Any M&A activity on the horizon?

- Any new audiences you'll need to consider?

OTHER: Any other competing priorities to be aware of?

- What else might stand in the way of gaining Manager & Employee attention & commitment to your project success?

[COPY THIS SLIDE FOR ADDITIONAL PROJECTS OR RELEASES]