PROJECT PURPOSE/BACKGROUND/PROJECT PITCH

|  |  |
| --- | --- |
|  | Key reasons(s) for the project, and any contextual of historical background |

POLICY AND PROCEDURAL REFERENCES

|  |  |
| --- | --- |
|  | Site the policies and/or procedures specific to this project. Add hyperlinks if possible. |

REQUIREMENTS

|  |  |
| --- | --- |
|  | The how, what, and when of key deliverables. Key reason for the project. Define scope. How does this support existing policies and procedures? Firm Deadline - If the deadline is firm, please provide business reason. |

POTENTIAL RISKS OR LIABILITIES

|  |  |
| --- | --- |
|  | Any potential pitfalls, completing priorities, change management, etc. |

RESOURCES AND CONSTRAINTS

|  |  |
| --- | --- |
|  | A Prioritized List of restrictions or limitations, and resources available. What do we need as a team to move the project forward? |

SCRIPT SCHEDULE

|  |  |
| --- | --- |
|  | Is this a BULK or individual script? Does this process from an existing list or data elements? Is this recurring? What’s the frequency? Where does this fall into SOP? |

COLLABORATION

|  |  |
| --- | --- |
|  | Target Audience Individuals and/or groups who will be directly and/or indirectly involved? Who is doing the work or who is impacted by the work? Provide expectations and recommendations if applicable.   Stakeholders Who has a vested interest in this project? Who would be testing/providing feedback?  Decision Makers Who needs to sign off/approve the project and how? |

|  |  |  |
| --- | --- | --- |
| **Collaboration Participant** | **Role in Project** | **Email** |
|  |  |  |

DESIRED RESULTS

|  |  |
| --- | --- |
|  | A prioritized list of specific and measurable deliverables. |

OTHER IMPORTANT INFORMATION

|  |  |
| --- | --- |
|  | Any additional information. Can also add attachments or links. |

Accelerant Plan Approval

|  |  |
| --- | --- |
|  | By signing this document, I acknowledge that I have received all the stated deliverables at the agreed to quality levels. Double click on the signature line to complete the signature process. |

