Many activities must be addressed in the program lifecycle’s program definition phase. This checklist breaks out key considerations to ensure the program business case, program charter, and program management plan support the needs of the program and deliver expected benefits.

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| **Program delivery phase checklist** | | | |
| **Program formulation phase** | | | |
| **Program business case** | | | |
| Consideration | Are the following considerations addressed? | Yes | No |
| Executive Summary | * Brief description of the program provided * Primary objectives and expected outcomes defined * Benefits of the program defined |  |  |
| Program/Outcomes | * approved ideas and concepts to implement shared * Objectives are specific, measurable, achievable, relevant, and timely * Expected results detailed |  |  |
| Analysis and Justification | * Examination of costs vs. Anticipated benefits illustrated * Detailed financial projections documented (budget, funding sources, ROI) * Potential solutions considered and reasons for rejection defined |  |  |
| Risk and Assumptions | * Key risks identified with potential impacts * Response strategies defined * Critical assumptions affecting program success described |  |  |
| Business and Operational Impact | * Positive and negative effects on business operations considered * Required changes to operational processes and structures described |  |  |

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| Benefits Analysis | * Intrinsic benefits (e.g., employee satisfaction, brand reputation) defined * Extrinsic benefits (e.g., revenue increase, market share growth) defined * Market conditions supporting or hindering the program described * Revenue projections and profit margins documented |  |  |
| Social, Environmental, and Legal Considerations | * Social impacts and community benefits defined * Environmental factors and sustainability considerations addressed * Legal requirements, compliance issues, and regulatory considerations accounted for |  |  |
| Implementation Plan | * Estimated timeline for bringing the program to market provided * Limitations or constraints (resources, time, technology, regulatory) identified |  |  |
| Strategic Alignment | * Alignment with overall strategic goals of the organization shared |  |  |
| Conclusion and Recommendations | * Recap of main points and findings shared * Final recommendations based on analysis and justification |  |  |
| **Program carter** | | | |
| Executive Summary | * Explanation of the program's need and purpose documented * Desired future state described |  |  |
| Strategic Alignment | * Alignment with organizational strategic goals defined |  |  |
| Scope and Benefits | * High-level description of deliverables, boundaries, and benefits realization plan provided |  |  |
| Assumptions and Constraints | * Key planning assumptions, constraints, limitations, and restrictions considered |  |  |
| Program Components | * Structure and major projects or workstreams defined |  |  |
| Risks and Issues | * Major risks, potential impacts, response strategies, and current issues defined |  |  |
| Timeline and Resources | * High-level schedule, milestones, deliverables, and needed resources shared |  |  |
| Stakeholder Considerations | * Key stakeholders, their roles, and engagement plan defined |  |  |
| Governance Framework | * Governance model, roles, responsibilities, decision-making authority, and progress monitoring included |  |  |
| Conclusion and Approval | * Recap and stakeholder sign-off |  |  |
| **Program planning phase** | | | | |
| **Program management plan** | | | | |
| Strategic Alignment | * Linkage between strategic goals and program components defined |  |  |
| Executive Ownership | * Responsible groups or individuals for benefits realization identified |  |  |
| Key Milestones | * Program roadmap finalized |  |  |
| List of Components and Information | * Dependencies across program components identified |  |  |
| Benefits Realization | * Defined period for benefits realization and transition defined |  |  |
| Approval Process | * Ensure all plans are approved before beginning the program lifecycle delivery phase |  |  |
| Summary | * The program definition phase is crucial as it lays the foundation for the entire initiative. Provide a brief summary of this plan |  |  |
| **Program management plan subsidiary plans** | | | |
| Benefits Management Plan | * Outlines how the program's benefits will be identified, monitored, and realized over time. Includes benefits measurement criteria and tracking mechanisms to ensure the anticipated benefits are achieved and sustained. |  |  |
| Stakeholder Engagement Plan | * Details how stakeholders will be identified, analyzed, and engaged throughout the program. Includes strategies for stakeholder communication, involvement, and managing expectations to ensure support and alignment with program goals. |  |  |
| Governance Plan | * Defines the governance structure for the program, including roles, responsibilities, decision-making authority, and processes for oversight and control. Ensures proper management and accountability throughout the program lifecycle. |  |  |
| Change Management Plan | * Describes how changes will be managed within the program. Includes processes for identifying, evaluating, and implementing changes and strategies for communicating and gaining acceptance for changes among stakeholders. |  |  |
| Communications and Information Management Plan | * Outlines how information will be collected, managed, and disseminated within the program. Includes communication strategies, channels, and schedules to ensure timely and effective communication among stakeholders. |  |  |
| Financial Management Plan | * Details the program's financial planning and management processes. Includes budgeting, forecasting, funding sources, financial controls, and reporting mechanisms to ensure the program stays within budget and achieves financial objectives. |  |  |
| Procurement Management Plan | * Describes how goods and services will be acquired for the program. Includes procurement strategies, supplier selection criteria, contract management processes, and mechanisms for ensuring timely and cost-effective procurement. |  |  |
| Quality Management Plan | * Outlines the quality standards and processes for the program. Includes quality assurance and control activities to ensure that the program's deliverables meet the required quality standards and stakeholder expectations. |  |  |
| Resource Management Plan | * Details how resources (human, financial, and material) will be allocated and managed within the program. Includes resource planning, allocation, tracking, and optimization strategies to ensure efficient and effective use of resources. |  |  |
| Schedule Management Plan | * Describes how the program's schedule will be developed, monitored, and controlled. Includes processes for defining activities, sequencing, estimating durations, and tracking progress to ensure timely completion of the program's objectives. |  |  |
| Scope Management Plan | * Outlines how the program's scope will be defined, validated, and controlled. Includes processes for managing scope changes and ensuring that the program's deliverables meet the agreed-upon requirements and objectives. |  |  |