



# THE AGILE PROJECT MANAGER

## Business Initiative Checklist

Thank you for downloading my rapid planning checklist! This is my 'secret weapon' when it comes to project planning using the Agile principles outlined in *The Agile Project Manager*. I trust you find it useful.

A business case is simply an explanation of a vision – a vision so empowering it moves people to action. Business cases can be time consuming and challenging to put together, involving many people from all areas of the business. But the time invested is well worth it.

The best way to put together a business case that moves people to action is to do this collaboratively, asking great questions: Why are we doing this? What will it give us? Then ensure the vision and risks are understood, as well as the stakeholders and what they plan to 'win' or 'lose'. High-level scope, the What, needs to be agreed at least in principle, as well as a high-level idea of how the project will be run.

Here are some steps to follow to get the best outcomes when planning your project.

EARLY PREPARATION
Identify the business sponsor. This person: <ul style="list-style-type: none"><li>• is responsible for the financial benefits (cost saving or revenue uplift)</li><li>• is responsible for allocating the project budget.</li></ul>
Identify the key stakeholders. These people include (but are not limited to) those who: <ul style="list-style-type: none"><li>• are responsible for realising any financial or non-financial benefits</li><li>• stand to benefit from the outputs of the project</li><li>• are responsible for delivering critical outputs of the project and are difficult to replace</li><li>• are contributing financially to the funding of the project</li><li>• are responsible for ensuring the project fits into the enterprise road map (i.e. enterprise architect)</li><li>• are business Subject Matter Experts.</li></ul>
THE PRE-PLANNING SESSION
Get the sponsor and the key stakeholders together for 1–2 hours and address the following questions about the project or initiative: <ul style="list-style-type: none"><li>• Is it real?<ul style="list-style-type: none"><li>○ Is there a need or desire for the product and can it be made?</li><li>○ Is the size of the market adequate?</li></ul></li><li>• Can we win?<ul style="list-style-type: none"><li>○ Can the product be competitive?</li><li>○ Can our company be competitive as a result?</li><li>○ Can the competitive advantage be sustained?</li></ul></li><li>• Is it worth doing? <sup>1</sup><ul style="list-style-type: none"><li>○ Will it be profitable at an acceptable risk?</li><li>○ Does doing this make strategic sense?</li><li>○ Will top management support it?</li></ul></li><li>• What would happen if we did nothing?</li><li>• Who do we need to have involved to plan this?</li><li>• Who is going to benefit the most? Who potentially loses out because of this?</li></ul>



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### THE WORKSHOP

Run a 1–2 day workshop to plan the project (driven by the project sponsor) – agenda:<sup>2</sup>

- What is the 'end game'? What does success look like? What is the ONE thing we absolutely need to do?
- What are the benefits? Financial and non-financial? What is the likelihood of achieving them?
- What are the risks? What could go wrong?
- Who are the key stakeholders? How do they need to be engaged?
- What are the high-level outputs the project will need to produce in order to be successful?
- How does this project align with our current and target state architecture?
- Who is critical to success? What do they stand to win or lose as a result of the project being successful?
- What are the costs (if known)?
- What is MOST important to success? Finishing on time? On budget? Satisfied stakeholders or team? Quality?
- How do we define quality? What are we happy to pay for? What are we NOT paying for?
- What are some of the organisational change management considerations?
- How will the project be governed?
- What are some of the considerations from an enterprise architecture perspective?
- How could the project be structured?
- Are there any timelines expected/necessary?
- What are the assumptions, risks, dependencies?

### POST WORKSHOP

Carry out detailed planning, including but not limited to:

- Work breakdown structure
- Impacts to other business areas
- Teams required to deliver project outputs and/or benefits
- Other initiatives dependent on the project
- Other initiatives the project is dependent on (or could leverage off/learn from)
- Roles and responsibilities
- Project team capacity and capability
- Current/new contracts in place
- As is/to be state of project from people, process, customer, technology and data perspective
- Detailed costs and financial modelling
- Updated benefits – financial and non-financial



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BUSINESS CASE CHECKLIST	
All stakeholders identified and engaged	
Sponsor's project vision clearly stated and understood by all stakeholders	
Risks identified and discussed	
Benefits identified and discussed	
Stakeholders' 'wins' and 'losses' identified with change management planning underway	
High-level scope items identified and agreed with stakeholders collaboratively	
Costs (including ongoing support) and benefits (with benefits owners) identified	
Benefits realisation activities detailed with a benefits realisation plan in place	
Other solution options that have been considered	
Business case reviewed by all key stakeholders	
Governance structure agreed and in place	
NEXT STEPS	
Project manager and sponsor work together to deliver on the business case by: <ul style="list-style-type: none"><li>• meeting regularly</li><li>• keeping the business case updated</li><li>• keeping key stakeholders engaged through agreed governance and regular communication.</li></ul>	

Following this rapid planning, the business case remains a living document that is updated when anything changes, especially changes that could impact the project benefits.

If the sponsor changes or the project changes significantly enough to require re-planning, get everyone together for another rapid planning session.

### References

1. 'Is it real? Can we win? Is it worth doing? Managing risk and reward in an innovation portfolio' – George S. Day, *Harvard Business Review*, December 2007.
2. *The Agile Project Manager's Toolkit* – Rob and Camille Thomsett, 2011.