

Project Readiness Questionnaire

TAC4 Solutions has led countless projects to success by ensuring the company and project team are ready for the complex heavy lifting they are about to undertake. This questionnaire hopes to spur ideas for any company thinking about starting a complex system transformation.

Questions

1. How will you backfill key project team members to protect them from extreme overtime?
2. How accurate and thorough is your Current State system documentation?
3. How accurate and thorough is your Current State process documentation?
4. How will your project be governed?
5. Who will manage the project?
6. What are leadership's goals and concerns of the project?
7. How should the new system prepare you for the future, in contrast to the old system?
8. Has leadership provided a timeline and budget that is thoroughly vetted with requirements and resources?

TAC4 Commentary

1. How will you backfill key project team members to protect them from extreme overtime?
 - a. You will want your most knowledgeable and energetic staff on the project team
 - b. These same people tend to be your go-to folks, already working long hours
 - c. Adding another fulltime job (i.e., the project) to their plate is typically unrealistic without proper backfill preparation
2. How accurate and thorough is your Current State system documentation?
 - a. System transformation cannot occur without a good understanding of your current system flow and processes
 - b. System diagrams should indicate all integrations from all systems, including frequency, types of data imported, and level of detail
 - c. Cross-functional teams should agree that the documentation is accurate
3. How accurate and thorough is your Current State process documentation?
 - a. System conversion is the best time to analyze existing workflows for optimal streamlining
 - b. Any process that touches more than a couple of people/roles would benefit from documentation and analysis
4. How will your project be governed?
 - a. Who will have authority to make detailed decisions? High-level decisions?
 - b. Who are the sponsors? How will they be updated on the project?
5. Who will manage the project?
 - a. Studies show that about 70% of complex projects fail



- b. One of the three primary drivers of project failure is Inexperienced Project Managers
 - c. For a complex project, your likelihood of success greatly increases by having a project manager who has driven multiple complex projects
- 6. What are leadership's goals and concerns of the project?
 - a. Long projects often get lost in the details and fail to meet executive goals
 - b. Project success depends on having clear executive goals and keeping those top of mind during every detailed decision
- 7. How should the new system prepare you for the future, in contrast to the old system?
 - a. Have you interviewed many users of the system?
 - b. What data levels do you wish you had for reporting?
 - c. What reports are needed?
 - i. Financial, Regulatory, Managerial, Ad-hoc
 - d. What features would improve your processes?
 - e. What integrations from or to other systems would help?
 - f. Project Readiness would list, categorize, and prioritize every detailed business requirement, so that vendor comparison can be made based on what matters most
- 8. Has leadership provided a timeline and budget that is thoroughly vetted with requirements and resources?
 - a. Most complex projects go-live with inadequate analysis, future-based design, and testing
 - b. Most projects would benefit from realistic estimates at a detailed level

TAC4 Synopsis

Answering these questions with research and realism in the early stages of the project will provide the information required to make good decisions. Otherwise, critical requirements will arise later in the project, creating exponentially more work, rework, and cost.

