**Project Need and Concept**

ADVANCED WORKSHEET

*“A means to capture first information about a new project”*

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Project or Effort Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Prepared By** | Name: | Tel: | Email: | Date: |
| **Revised By** | Name: | Tel: | Email: | Date: |
| **Sponsor** | Name: | Tel: | Email: | Date: |
|  |  |

**What is This Worksheet -** This worksheet provides a means for any organization to capture and communicate the first information generated about a potential project for purposes of discussion and a decision to pursue the project or not. Information in the worksheet includes the need for the project and the initial ideas about the project’s concept and is intended to be used on any size or type of project.

This worksheet is a “first look” at a potential project and precedes a detailed business case, where that is needed, and precedes a project definition (or project charter) that itself, precedes the project plan.

**Why Use This Worksheet –** Efforts fail and are successful for the same reasons. Communications, clear project need, understood root causes, roles, impacts, the right alternative solution and other factors can make or break any project. This worksheet supports attainment of these critical project success factors.

**How to Use This Worksheet –** Use this worksheet to capture information about a new idea for a project. Completion of the worksheet in a team environment usually provides the best results.

**Worksheet Sections**

1. State the Problem or Needed Improvement or an Overall Reason for a New Project
2. State the Impacts of No Action
3. State Root Causes or Root Drivers of the Current Condition that Need Change
4. State the Desired Outcome
5. State Alternatives to This Project That Were (or Will Be) Considered
6. State What this Project Might Be / Do
7. State Known Potential Challenges for This Project
8. Possible Negative Impacts of This Project
9. State a Priority for this Project Relative to the Organization’s Strategic Interests
10. State the Probability that a Sound Business Case Supporting this Project Will Exist
11. Qualitative Magnitude of Needed Resources
12. Additional Notes
13. Stakeholders Involved and Note Currently Known Roles
14. Next Steps

WORKSHEET

1. **State the Problem or Needed Improvement or an Overall Reason for a New Project**

The problem or thing that needs change is ……………………

1. **State the Impacts of No Action** – If nothing is done, what happens?

If this situation is not changed, the following conditions are likely to result …………………..

If no action is taken, the impacts to key stakeholders are likely to be:

* Impact on Customers of No Action –
* Impact on Organization of No Action –
* Impact on Employees of No Action –
* Impact on Stakeholder A of No Action –
* Impact on Stakeholder B of No Action –
* Impact on Stakeholder C of No Action –
1. **State Root Causes or Root Drivers of the Current Condition that Need Change**

[ ]  Not Known at this Time [ ]  Partially Known; See Below [ ]  Known; See Below

The primary reason (s) the current situation exists is due to (i.e. “why does the situation in #1 above exist?”)

* xx
* xx
* xx
1. **State the Desired Outcomes** – What are the final conditions that are desired to exist after completion of this project?

It is desired that the following advantages result from this project:

Cost Advantages – xx

Schedule Advantages – xx

Quality Advantages – xx

Customer Advantages – xx

Organization Advantages – xx

Employee Advantages – xx

Other Advantages – xx

Other Advantages - xx

1. **State Alternative Projects That Might Meet the Desired Outcomes and Address the Root Causes**

[ ]  No Alternatives [ ]  Some Will Be Defined [ ]  Some Are Defined; See Below

Alternatives Considered (or Will Be Considered) Are:

* xx
* xx
1. **State What the Project Might Be / Do**

This project would be ……………………… and/or

This project would do ………………………

1. **State Known Potential Challenges or Risks for This Project**

The challenges for this project will likely be:

* xx
* xx
* xx
1. **Possible Negative Impacts of This Project** – If this project is performed, what bad things might happen?

[ ]  None [ ]  None Known, Some May Exist [ ]  Some; See Below

The negative impacts and their respective probabilities resulting from this project could be

* xx
* xx
* xx
1. **State a Priority for this Project Relative to the Organization’s Strategic Interests**

[ ]  Low Priority [ ]  Medium Priority [ ]  High Priority [ ]  A “Must Do”

[ ]  Already Directed by Management

Comments or Notes:

1. **State the Probability that a Sound Business Case Supporting this Project Will Exist**

[ ]  Low Probability [ ]  Moderate Probability [ ]  High Probability

[ ]  Business Case Already Exists and a summary follows……………..

Comments or Notes:

1. **Qualitative Magnitude of Needed Resources in terms of People, $s and Time to Perform this Project**

[ ]  Small [ ]  Moderate [ ]  Big Effort [ ]  Very Big Effort

Schedule Range Guess ………………

Budget Range Guess …………….

Personnel Needed …………

Other Resources Needed …..

This project is likely to be similar in magnitude to ………(insert the name of a past similar project if that is available)……………………

Additional Comments or Notes:

1. **Additional Notes**
* xxx
* xxx
* xxx
1. **Key Stakeholders Involved and Note Currently Known Roles**

|  |  |
| --- | --- |
| Name: | Role: |
| Name: | Role: |
| Name: | Role: |
| Name: | Role: |

1. **Next Steps** – Information Distribution, Reviews, Approvals, Studies, Assignments, Further Information Gathering, ….

|  |  |  |  |
| --- | --- | --- | --- |
|  | Next Step | Responsibility | Due Date |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |
| 4 |  |  |  |

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END OF

**Project Need and Concept Advanced Worksheet**

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