**Project Need and Concept**

BASIC WORKSHEET

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

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

*Worksheet Completed By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 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 take further action 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 What this Project Might Be / Do
6. Qualitative Magnitude of Needed Resources
7. Additional Notes
8. 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 …………………..

1. **State Root Causes or Root Drivers of the Current Condition that Need Change**

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 Outcome** – What are the final conditions that are desired to exist after completion of this project?

It is desired that a new project will provide / deliver / change / …….

1. **State What this Project Might Be / Do**

This project would ………………………

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

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

This project is likely to be similar in magnitude to ……………………………

Comments or Notes:

1. **Additional Notes**
* xxx
* xxx
* xxx
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 Basic Worksheet**

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