

High-Level Checklist for Each of the Six Steps in the BPI Project Management Process

STEP	DESCRIPTION
1	Understand and Socialize the Process
<input type="checkbox"/>	You have a solid understanding of the BPI project initiative and the problem to be solved by this initiative (objectives, business goals, vision)
<input type="checkbox"/>	Executive/senior leadership supports the initiative
<input type="checkbox"/>	Team members (preliminary) have been identified to serve on the BPI initiative
<input type="checkbox"/>	Initial list of potential champions and resisters have been identified
<input type="checkbox"/>	A preliminary communication plan to socialize the initiative has been developed
<input type="checkbox"/>	Preliminary project plan documentation has been developed (charter, scope statement, business case, high level schedule, risk plan, etc.)
<input type="checkbox"/>	Desired performance improvements in the business (goals to measure against) have been identified
<input type="checkbox"/>	Preliminary timelines as well as a preliminary budget has been developed
<input type="checkbox"/>	Preliminary training needs and implementation/roll out plans have been developed
<input type="checkbox"/>	Initial stakeholder meetings are planned
<input type="checkbox"/>	The team kick off meeting has been planned (agenda developed, location determined, invitee list developed, activities planned, etc.)
<input type="checkbox"/>	Status reporting meetings have been scheduled
<input type="checkbox"/>	Processes and procedures for team members to work together, solve problems, resolve conflicts, make decisions, etc. have been collaboratively developed
<input type="checkbox"/>	Project documentation/project plan has been finalized (scope, schedule, budget, communication plans, risk plan, quality plan, etc.)
<input type="checkbox"/>	Pilot test group members are selected
STEP	DESCRIPTION
2	Analyze Business Processes
<input type="checkbox"/>	Stakeholder meetings have been scheduled and a facilitator selected (for gathering requirements, documenting the current process)
<input type="checkbox"/>	Status reporting is occurring regularly
<input type="checkbox"/>	Regular communication are happening through a variety of channels to keep stakeholders engaged
<input type="checkbox"/>	The project team is moving forward, communicating regularly and following processes and procedures
<input type="checkbox"/>	The process is mapped out, documented and validated
<input type="checkbox"/>	Quick wins are identified
<input type="checkbox"/>	Findings are presented to the sponsor/key stakeholders
<input type="checkbox"/>	Risk management is happening
STEP	DESCRIPTION
3	Redesign Business Processes
<input type="checkbox"/>	Communication plans are updated – stakeholder as well as team communications
<input type="checkbox"/>	Best practices are researched for process redesign
<input type="checkbox"/>	Evaluation of criteria required for process redesign is validated (objectives of BPI project)
<input type="checkbox"/>	Process mapping workshops are scheduled and a facilitator selected
<input type="checkbox"/>	Ideas for process redesign are evaluated and “could be” options designed
<input type="checkbox"/>	“Could be” process redesign options are evaluated and validated

STEP	DESCRIPTION
<input type="checkbox"/>	“Could be” options are narrowed down to create the “to be” option
<input type="checkbox"/>	Sponsor/key stakeholder presentations are occurring
<input type="checkbox"/>	The “to be” process is finalized
<input type="checkbox"/>	A variety of options for training is developed
<input type="checkbox"/>	The pilot group is engaged in the initiative and is regularly updated
<input type="checkbox"/>	Risk management is happening
<input type="checkbox"/>	New process documentation/reference materials are being developed
<input type="checkbox"/>	Regular communication are happening through a variety of channels to keep stakeholders engaged
STEP	DESCRIPTION
4	Implement Redesigned Process
<input type="checkbox"/>	Redesigned “to be” process is shared with all stakeholders through a variety of channels
<input type="checkbox"/>	Pilot group is engaged in testing the “to be” process – they are being trained in the new process
<input type="checkbox"/>	Training options are communicated and training on stakeholders is being scheduled
<input type="checkbox"/>	Risk management is happening
<input type="checkbox"/>	Feedback mechanisms for pilot group testing are set up and in place
<input type="checkbox"/>	Regular meetings with pilot group testers are scheduled and facilitated
<input type="checkbox"/>	Adjustments are made to the “to be” process as needed based on feedback/evaluation by testers
<input type="checkbox"/>	Training plans for all users are finalized and ready for roll out
<input type="checkbox"/>	Regular communication are happening through a variety of channels to keep stakeholders engaged
<input type="checkbox"/>	Presentation to the sponsor/key stakeholders on the “to be” process for final approval is scheduled
<input type="checkbox"/>	Finalize new process documentation/reference materials
<input type="checkbox"/>	Develop a roll out approach
STEP	DESCRIPTION
5	Roll Out Redesign Process
<input type="checkbox"/>	Finalize the roll out approach
<input type="checkbox"/>	Schedule training classes for all users
<input type="checkbox"/>	Develop and share the roll out schedule
<input type="checkbox"/>	Provide documentation/reference materials on new process
<input type="checkbox"/>	Provide channels/forums for feedback from users
<input type="checkbox"/>	Develop methods to regular check-in with users
<input type="checkbox"/>	Provide regular checks/updates to sponsor/key stakeholders
STEP	DESCRIPTION
6	Evaluate and Measure
<input type="checkbox"/>	A process/plan to evaluate the ongoing success of the rolled out process is developed and communicated
<input type="checkbox"/>	An evaluation team has been created
<input type="checkbox"/>	Regular feedback sessions and methods for providing feedback are scheduled/rolled out
<input type="checkbox"/>	Information on the roll out/use of the new process is shared organization wide
<input type="checkbox"/>	Results are reported to sponsor/key stakeholders
<input type="checkbox"/>	Process is evaluated against monetary/business impacts – project expectations