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| **PPM INTAKE PROCESS** |
| **□** | Operations-Project Checklist |  |  |
| **□** | New Project Intake Worksheet |  |  |
| **□** | Status Reports/Executive Dashboards |  |  |
| **DISCOVERY** |
| **□** | Business Case |  |  |
| **□** | Project-level Assessment |  |  |
| **□** | Business Case with Alternatives to Proposed Action |  |  |
| **□** | Project Feasibility Study |  |  |
| **□** | Status Reports/Executive Dashboards |  |  |
| **INITIATION** |
| **□** | Project Charter |  |  |
| **□** | Stakeholder Roles & Responsibilities |  |  |
| **□** | Kick-off Meeting Agenda |  |  |
| **□** | Stakeholder Engagement Plan |  |  |
| **□** | Scope Statement |  |  |
| **□** | Status Reports/Executive Dashboards |  |  |
| **PLANNING** |
| **□** | WBS & Schedule Planning Worksheet |  |  |
| **□** | Project Schedule (i.e., MS Project) |  |  |
| **□** | Staffing Plan |  |  |
| **□** | RACI Chart |  |  |
| **□** | Budget Planning Worksheet |  |  |
| **□** | Risk Register – Issue Log |  |  |
| **□** | Benefits Register |  |  |
| **□** | Communication Plan |  |  |
| **□** | Quality Management Plan |  |  |
| **□** | Agenda – Minutes – Action Items |  |  |
| **□** | Change Impact Assessment |  |  |
| **□** | Change Management Plan |  |  |
| **□** | Status Report/Executive Dashboard |  |  |
| **DELIVERY** |
| **□** | Business Requirements |  |  |
| **□** | Functional Requirements |  |  |
| **□** | Requirements Checklist Template |  |  |
| **□** | Change Request |  |  |
| **□** | Change Request Log |  |  |
| **□** | Use Case Template |  |  |
| **□** | Test Case Template |  |  |
| **□** | Transition Plan |  |  |
| **□** | Status Report/Executive Dashboard |  |  |
| **CLOSURE** |
| **□** | Project Closure Checklist |  |  |
| **□** | Project Acceptance Checklist |  |  |
| **□** | Project Documents to Archive |  |  |
| **□** | Project Management Process Evaluation - Change Lessons Learned |  |  |
| **□** | Status Report/Executive Dashboard |  |  |
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| **VALUE** |
| **□** | Benefits Realization Report |  |  |
| **□** | Status Report/Executive Dashboard |  |  |
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