

Project Intake

gain up-front clarity and alignment on project outcomes and deliverables

With the press of business, we need to get clarity and understand objectives quickly so we can be more efficient and deliver the high-quality work that's expected of us.

Ask these questions of your client or manager to gather the critical information you need to understand a new project and to drive your thinking and strategic planning from start to finish.


1. What is the desired business outcome?

 **WATCH OUT!** *Communication is never an outcome*

2. Explain the business environment and the business need.

3. How would you describe project success? How would you like to measure success and are there current measurements to consider?

4. Who are the target audience(s)? What do we want them to do?

 **WATCH OUT!** *Looking for specific behaviors*

5. What are the project deliverables you envision?

6. What is your desired timing?

 **WATCH OUT!** *Understand what's driving the timing*

Other possible questions

- Roadblocks to achieve the outcome?
- Connection to organization and strategy?
- Key messages?
- Approval process?

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Project Intake Worksheet

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Project Name _____ Owner _____ Date _____

1. What is the desired business outcome?

2. Explain the business environment and the business need.

3. How would you describe project success?
How would you like to measure success and are there current measurements to consider?

4. Who are the target audience(s)?
What do we want them to do?

5. What are the project deliverables you envision?

6. What is your desired timing?

Other key learnings/considerations

- Are there areas from your conversation where expectations need to be reset?
- Smart people have been here before. Who are they? How do we tap into that knowledge?
- Are there subject matter experts that can assist us with this work? If not, what is our need? How do we access the best resources?



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