

PROJECT READINESS WORKSHEET

IT Project Readiness Assessment

Most failed IT projects were doomed at the scoping stage. Run this before you approve the budget.

01	The requirements questions that prevent scope creep
02	How to structure milestones so risk stays with the vendor
03	Red flags in a proposal that predict overruns

Use this guide to assess where you are, identify the evidence you need, and turn the biggest gaps into a practical action plan.

Prepared by Brotherly Technology

Owner-led IT, security, and compliance support.

15-MINUTE ASSESSMENT

Start with the current state

Mark each item Yes, Partial, or No. A written policy only counts as Yes when the process is operating and you can show evidence.

☐ A business owner is accountable for the outcome and budget.	☐ Yes ☐ Partial ☐ No
☐ Success measures describe the changed business result, not just delivered technology.	☐ Yes ☐ Partial ☐ No
☐ Users, workflows, data, integrations, constraints, and exceptions are mapped.	☐ Yes ☐ Partial ☐ No
☐ Requirements are ranked must-have, should-have, could-have, and out-of-scope.	☐ Yes ☐ Partial ☐ No
☐ Assumptions and dependencies have owners and validation dates.	☐ Yes ☐ Partial ☐ No
☐ Security, privacy, compliance, accessibility, backup, and support are included.	☐ Yes ☐ Partial ☐ No
☐ Acceptance criteria are observable and testable by the client.	☐ Yes ☐ Partial ☐ No
☐ Data migration includes cleanup, mapping, reconciliation, and rollback.	☐ Yes ☐ Partial ☐ No
☐ The plan includes training, communications, adoption, and process changes.	☐ Yes ☐ Partial ☐ No
☐ Milestones produce usable evidence before most of the budget is spent.	☐ Yes ☐ Partial ☐ No
☐ Change control states who can approve cost, scope, and schedule changes.	☐ Yes ☐ Partial ☐ No
☐ Operations, documentation, credentials, warranties, and post-launch support are defined.	☐ Yes ☐ Partial ☐ No

Quick score: Yes = 2, Partial = 1, No = 0. Start with any No that could stop work, expose sensitive data, or create an avoidable contract cost.

REQUIREMENTS

Ask the questions that prevent scope creep

Scope creep starts when a necessary decision stays implicit. Use these prompts to turn assumptions into testable requirements.

Question area	Ask this	Evidence / decision
Outcome	What must be measurably better after launch?	Baseline, target, owner, review date
Users	Who uses it, approves it, supports it, and is excluded?	Roles, volumes, access matrix
Workflow	What is the normal path and the costly exception?	Process map and exception list
Data	What moves, who owns it, and how is accuracy proven?	Data map and reconciliation test
Integration	What happens when either system is slow or unavailable?	API owner, retry, alert, manual fallback
Acceptance	What observable result means this requirement is done?	Test, expected result, approver
Operations	Who patches, monitors, backs up, supports, and changes it?	Runbook, SLA, handoff plan

Put exclusions beside inclusions. A clear 'not in this phase' protects the budget and gives future requests a deliberate home.

Use milestones that keep delivery risk visible

Tie payments to accepted evidence and working outcomes. Avoid front-loading the budget before architecture, data, and usability risks are tested.

1	Milestone 1: discovery artifacts - requirements, risks, architecture, delivery plan, and a refined estimate.
2	Milestone 2: highest-risk proof - prototype, integration spike, data sample, or security design that resolves key uncertainty.
3	Milestone 3: usable pilot - priority workflow in a test environment with documented acceptance results.
4	Milestone 4: production readiness - migration rehearsal, training, support plan, monitoring, backup, rollback, and approvals.
5	Milestone 5: stabilization - defects, performance, adoption, documentation, credentials, and final handoff.

What to watch for

WATCH: The proposal promises an outcome but lists only hours and roles.

WATCH: Acceptance means the vendor says work is complete.

WATCH: Most payment is due before a working pilot or migration rehearsal.

WATCH: Migration, security, training, documentation, or post-launch support is excluded.

WATCH: Change requests can be approved informally without cost and schedule impact.

MAKE IT ACTIONABLE

Turn the worksheet into a 30-day plan

Do not try to solve everything at once. Assign one owner, one next action, and one date for each priority.

NOW	Name the owner and confirm the current state.	_____
NEXT 7 DAYS	Fix the highest-risk gap or gather the missing evidence.	_____
NEXT 30 DAYS	Complete the remaining quick wins and set review dates.	_____
NEXT QUARTER	Test the process, document results, and assign improvements.	_____

Notes / decisions / questions for your provider

Want a second set of eyes? Book a free consultation at brotherlytechnology.com/contact/ or call 404-907-1005.

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