

PROJECT INTAKE CHECKLIST

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DISCOVERY PHASE

	TASK	DATE COMPLETED
	The project owner approaches the designated requester with the project idea.	
	The project owner and requester develop the business case.	
	The project owner and requester complete the project intake form.	
	The project owner and requester secure informal feedback on the request form.	
	The requester submits the project intake form for review.	

ASSESSMENT PHASE

	TASK	DATE COMPLETED
	The project is reviewed for high-level feasibility and approved.	
	The project is reviewed for resource-related feasibility and approved.	
	The project is reviewed for alignment with the strategic goals of the organization.	
	Final approvals are obtained.	

PLANNING PHASE

	TASK	DATE COMPLETED
	The PMO assigns a priority level and ID number to the project.	
	The PMO selects a project leader to develop the project plan.	
	The project leader develops a project plan.	
	The project leader submits the plan to the PMO for approval.	
	The PMO reviews and approves the project plan.	

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