**Checklist Purpose**

The following Checklist, which complements the Project Management Methodology Guide, is organized by Life Cycle Phase aligned with the Methodology Guide. Its objective is to be a quick guide for formal or self-assessment to help ensure key activities for each Phase have been addressed.

If there are unique aspects of a project which require regular checking to maintain the health of a project that are not covered in this Checklist, they can be added.

**Checklist Process**

At each Project Life Cycle Phase a review by the appropriate Consulting Manager should be performed. This can be completed with the Client, Partner and/or Pega teams. Alternatively, the Health Check can be kept between the Consulting Manager and the Engagement Leader/Practice Leader.

The checks for Pre-Inception, Inception, Post Go-Live, and Closure will most likely be performed once. The checks for Monitor & Control should be done at regular intervals to maintain the health of the project.

The goal is to check the project characteristics and performance against the Project Management Methodology to identify any potential issues as early as possible.

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| **Pre-Inception & Inception** | **Status** | **notes** |
| **SOW / Contract** – Is a commercial arrangement in place? Are the boundaries of the arrangement understood and have they been used to define the project? |  |  |
| **Co-Production** – Has a Co-Production Plan been completed, agreed by Client, and been built into the schedule? |  |  |
| **Schedule** – Is there an over-arching schedule that addresses all interdependencies, proposed sprint cycles, test periods, activity ownership (e.g. client, partner, Pega), and has it been agreed to? |  |  |
| **Governance** – Has governance been set up? (I.e. governance workbook created, meetings scheduled, steering committee established, change control board established, reporting agreed, etc.) |  |  |
| **Sales to Service** – Has the Sales to Service/Delivery process been effectively completed? Are there any outstanding questions/issues for the Sales team? |  |  |
| **Technical** – Has infrastructure been set up? Has the backlog been created &/or requirements gathered? Have the actors, application profile, reports, and correspondence been identified. Has Gap Analysis been performed? |  |  |
| **Tools** – Have the tools of choice to control and monitor the project been chosen and put in place? Has access been provided to appropriate staff? Has the project been set up in PAC, time tracking, and other corporate systems? Has BSW and Sizing tool been transferred into on-going tracking tools? |  |  |

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| **Monitor & Control** | **Status** | **notes** |
| **SOW / Contract** – Are alterations to the agreements being identified and managed through the Change Control process? |  |  |
| **Co-Production** – Is the client following the Co-Production Enablement Plan? Are they performing technical tasks compatible to their role and skills? |  |  |
| **Schedule** – Is the over-arching schedule on track? Are interdependencies such as interfaces on track? Are client and partner commitments being completed on time? Can the burndown be clearly identified? |  |  |
| **Governance** – Are risks, issues, assumptions, etc. being effectively managed? Are governance meetings happening and effectively resolving issues that arise? Is reporting happening regularly with transparency and completeness? |  |  |
| **Technical** – Are DCO sessions consistently being done? Are guardrails and defects being kept to best practice standards? Is system performance being monitored? Are all technical considerations being addressed (i.e. security, data conversion, release notes, etc.) |  |  |
| **Scrum** – Are Scrum ceremonies being performed? Are sprints being refined according to velocity consistency and retros? Are roles by the client, partner, and Pega being performed appropriately? |  |  |

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| **Go-live** | **Status** | **notes** |
| **SOW / Contract** – Does the solution meet contract obligations? Has the client signed-off? |  |  |
| **Co-Production** – Has the client actively participated in the planning and performing technical tasks during Go-Live? |  |  |
| **Schedule** – Are all interdependencies in place? |  |  |
| **Governance** – Has a Go-No Go been performed? |  |  |
| **Technical** – Has the client approved outstanding defects and the guardrail score for Go-Live? Are Release Notes complete and ready for distribution? Has GCS Handover been completed? Has BAU handover been completed? |  |  |
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| **Closing phase** | **Status** | **notes** |
| **SOW / Contract** – Are alterations to the agreements being identified and managed through the Change Control process? |  |  |
| **Co-Production** – Is the client certified in Pega according to the Co-Production Plan? Is the client Pega self-sufficient? |  |  |
| **Governance** – Has documentation been archived? Have all resources been released? |  |  |
| **Technical** – Is the system stable? |  |  |
| **Scrum** – Has a post project retro been done? |  |  |
| **Tools** – Has the project been closed in all corporate systems? |  |  |