|  |
| --- |
| **A picture containing text  Description automatically generatedPILOT PROJECT SUCCESS CRITERIA TEMPLATE** |
| **ACTION** | **DESCRIPTION** | **REQUIREMENTS** | **PRIORITY** | **% of PROGRESS** | **STATUS** | **APPROVAL STATUS** | **DESIRED DATE** | **DATE RATIONALE** |
| **Project Initiation** | **Basics to getting started** |  |  |  |  |  |  |  |
| Vision Statement | *Overview of project goals and benefits* | [Attach project overview document] | HIGH | 100% | Complete | Approved | 00/00/0000 |   |
| Executive Approval | *Signoff and sponsorship* | [Copy email or other approval] | MED | 65% | Not Started | Submit for Approval | 00/00/0000 |   |
| Funding Secured | *Financial commitment to pursue definition* | [Attach budget or copy email] | LOW | 25% | In Progress | Submitted | 00/00/0000 |   |
| **Requirements Discovery & Research** | **How and where to gather requirements?** |  |  |  |  |  |  |  |
| Identify Capture Techniques | *How will you collect the information?* | [Attach prep materials and results to each row] |   |   | Complete | Needs review | 00/00/0000 |   |
| Identify Sources | *Who to involve?* |   |   |   |   |   |   |   |
| **Requirements Analysis** | **Break down discovery findings into specific, categorized requirements. Edit, remove, and add indented rows as needed to make requirements clear and actionable.** |  |  |  |  |  |  |  |
| Functional Requirements | *What tasks does it perform?* |   |   |   | On Hold | Submit for Approval | 00/00/0000 |   |
| Timing | *What are the driving dates?* |   |   |   | Overdue | Submitted | 00/00/0000 |   |
| Marketing, Sales, & Service Requirements | *How does it get to buyers and users?* |   |   |   | Needs Review | Needs Review | 00/00/0000 |   |
| Technical Requirements |  |   |   |   |   |   |   |   |
| Look & Feel Requirements | *How do you interact with it?* |   |   |   |   |   |   |   |
| Performance Requirements |  |   |   |   |   |   |   |   |
| Operational Requirements |  |   |   |   |   |   |   |   |
| Expectations & Boundaries |  |   |   |   |   |   |   |   |
| Future/Deferred Requirements |  |   |   |   |   |   |   |   |
| **Use Case Analysis** | **How is the solution used? Paint a picture of how users experience it.** |   |   |   |   |   |   |
| Title - Use Case 1 |  |   |   |   |   |   |   |   |
| Title - Use Case 2 |  |   |   |   |   |   |   |   |
| **Summary Plan Document** | **Brief overview of key learnings -- outline for actionable project plan** |   |   |   |   |   |   |
| Executive Summary |  |   |   |   |   |   |   |   |
| Scope & Context |  |   |   |   |   |   |   |   |
| Product Description | *Based on gathered requirements* |   |   |   |   |   |   |   |
| *Design Goals* |  |   |   |   |   |   |   |   |
| *Feature Overview* |  |   |   |   |   |   |   |   |
| *Mockups* |  |   |   |   |   |   |   |   |
| *Pricing & Forecasts* |  |   |   |   |   |   |   |   |
| *Team and Resources* |  |   |   |   |   |   |   |   |
| *Summary Timeline* |  |   |   |   |   |   |   |   |
| References |  |   |   |   |   |   |   |   |

|  |
| --- |
| **DISCLAIMER**Any articles, templates, or information provided by Smartsheet on the website are for reference only. While we strive to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the website or the information, articles, templates, or related graphics contained on the website. Any reliance you place on such information is therefore strictly at your own risk. |