|  |  |  |  |  |  |  |  |  |
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| **[A picture containing text  Description automatically generated](https://www.smartsheet.com/try-it?trp=11414&utm_source=integrated+content&utm_campaign=/content/project-success-criteria-checklist-templates&utm_medium=Pilot+Project+Success+Criteria+doc+11414&lpa=Pilot+Project+Success+Criteria+doc+11414&lx=PFpZZjisDNTS-Ddigi3MyABAgeTPLDIL8TQRu558b7w)PILOT 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 |  |  |  |  |  |  |  |  |

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