Introduction to the BPR Initiating Process Phase Checklist Template

Once the activities within the Initiating Process Phase are completed, the phase checklist should be reviewed and completed. The checklist assists the project team in quickly and confidently identifying areas of concern early on.

Instructions and descriptions are provided to help the reader understand each section’s purpose and how to complete it.

Template style conventions are as follows:

| Style | Convention |
| --- | --- |
| Normal text | Indicates placeholder text that can be used for any project |
| [Instructional text in brackets] | [Indicates text that is be replaced/edited/deleted by the user] |
| *Example text in italics* | *Indicates text that might be replaced/edited/deleted by the user* |

As you complete the template, please remember to delete all instructional text (including this section) and update the following items, as applicable:

* title page
* version history
* table of contents
* headers
* footers

Update the document to a minor version (e.g., 1.1, 1.2) when minimal changes are made and a major version (e.g., 2.0, 3.0) when significant changes are made.

BPR Initiating Process Phase Checklist

[The Initiating Process Phase Checklist provides a list of items for the project team to complete in order to verify that all work and project management processes in this particular phase are complete. Completion of tasks and deliverables may include:

* Determine and Plan for BPR Activities
* Identify Customer Needs
* Identify Business Process Issues
* Identify Leading Practices and Benchmarks
* Identify, Validate, and Prioritize Opportunities
* Document the Current State Assessment
* Determine the Performance Baseline
* Other BPR specific documents or activities should be added as project needs dictate.

In the table below, enter each document/activity that should be completed during this Process Phase. Identify the task owner, their role for each document/activity, and provide its completion date.]

| Knowledge Area | Document/Activity Completed | Task Owner Name, Role | Date |
| --- | --- | --- | --- |
| BPR Lifecycle Management | Completed BPR Schedule | [identify the person who confirmed completion] | [completion date] |
| Business Analysis and Future Definition | Identified Customer Needs | [identify the person who confirmed completion] | [completion date] |
| Business Analysis and Future Definition | Identified Business Process Issues | [identify the person who confirmed completion] | [completion date] |
| Business Analysis and Future Definition | Identified Benchmarks | [identify the person who confirmed completion] | [completion date] |
| Business Analysis and Future Definition | Identified Leading Practices | [identify the person who confirmed completion] | [completion date] |
| Business Analysis and Future Definition | Prioritized Opportunities | [identify the person who confirmed completion] | [completion date] |
| Business Analysis and Future Definition | Completed Current State Assessment | [identify the person who confirmed completion] | [completion date] |
| Business Process Design | Completed Current State Process Model | [identify the person who confirmed completion] | [completion date] |
| Performance Management | Completed Performance Baseline | [identify the person who confirmed completion] | [completion date] |
| Performance Management | Completed Performance Metric Assessment | [identify the person who confirmed completion] | [completion date] |
| N/A | Completed Closing Process Phase Checklist | [identify the person who confirmed completion] | [completion date] |