**[](https://www.smartsheet.com/try-it?trp=11506&utm_source=integrated-content&utm_campaign=/content/project-intake&utm_medium=Project-Intake-Checklist+doc+11506&lpa=Project-Intake-Checklist+doc+11506&lx=PFpZZjisDNTS-Ddigi3MyABAgeTPLDIL8TQRu558b7w)PROJECT INTAKE CHECKLIST**

DISCOVERY PHASE

|  |  |  |
| --- | --- | --- |
| **X** | **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

|  |  |  |
| --- | --- | --- |
| **X** | **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

|  |  |  |
| --- | --- | --- |
| **X** | **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. |  |

|  |
| --- |
| **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. |