**PROJECT INTAKE CHECKLIST**

DISCOVERY PHASE

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| **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

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| **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

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| **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. |   |

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