

Integration Project & Planning Checklist

When establishing your integrated program team and subsequently making the business case to management, the following checklist can serve as a guide in planning and overall project management.

KEY QUESTIONS	ANSWERS	COMMENTS
Have stakeholders and therefore project team members been selected from the following areas within your organization?		
Human resources/benefits		
Legal/compliance		
Employee relations		
Finance		
Payroll		
Onsite medical		
Risk management		
Health and safety		
Ergonomics		
Human resources operations		
Information technology		
Communications		
Field representatives		
Union representatives		
External vendors and consultants		
EAP		
Have stakeholders' roles and responsibilities been clearly defined, communicated, and agreed to by all parties, such as the following?		
Meeting attendance		
Data gathering		
Input and review		
Scenario planning and testing		
Peer review		
Final decision		
Has your organization taken the following steps to make the business case for change?		
Identify what is working well		
Determine future state and overall goals		
Conduct gap analysis against current and future states		
Perform a cost-benefit analysis or expected ROI calculation		
Define metrics/measures of success and methods for collecting necessary data		