

Principled Solutions - Project Health Assessment

Client Intake Form - Project Health Assessment

Fixed Fee: \$5,000

Duration: 2 days (final deliverable delivered within 48 hours of close of business on Day 2)

SECTION 1 - CLIENT INFORMATION

Organization Name:

Primary Point of Contact:

Title:

Phone:

Email:

SECTION 2 - PROJECT OVERVIEW

Project Name:

Project Sponsor:

Project Manager:

Primary Objective / Purpose:

Current Project Phase: Initiation / Planning / Execution / Monitoring / Closing

SECTION 3 - CURRENT STATUS & DOCUMENTATION (attach files or share links)

- Project Plan (scope, schedule, budget)
- Latest Status Report or dashboard
- RAID Log / Risk Register
- Compliance or regulatory reports (if applicable)
- Budget / EVM data (if available)

SECTION 4 - STAKEHOLDER INFORMATION (name, role, email, phone)

1) _____ 2) _____ 3) _____

SECTION 5 - AREAS OF CONCERN (check all that apply)

Scope Schedule Budget Quality Stakeholder Alignment Vendor Performance Compliance
Risk Management Other: _____

SECTION 6 - ACCESS & LOGISTICS

Preferred Interview Dates:

Meeting Access Info:

File Access Method (SharePoint, Teams, Email):

AUTHORIZATION

By signing, you authorize Principled Solutions to conduct the Project Health Assessment and agree to provide requested information and access.

Signature: _____ Date: _____ Name/Title: _____

Execution Checklist - Project Health Assessment

Duration: 2 Days

Fixed Fee: \$5,000

Final Deliverable: Delivered within 48 hours after close of business on Day 2

DAY 0 - PRE-ENGAGEMENT PREP

- Signed Intake Form and agreement received
- Invoice issued (per contract)
- Review intake documents
- Assign assessment lead and internal reviewer
- Prepare tailored interview questions
- Schedule kickoff and interviews

DAY 1 - DISCOVERY

- Kickoff with sponsor and PM
- Review project plan, RAID, status, compliance docs
- Stakeholder interviews (sponsor, PM, 2-3 key team members)
- Capture findings and concerns
- Identify immediate red flags / high-risk areas
- Start Findings Matrix

DAY 2 - ANALYSIS AND DRAFTING

- Complete interviews
- Analyze findings against best practices
- Validate critical risks, dependencies, and compliance gaps
- Draft Recommendations and Roadmap
- Prepare Risk Heatmap and Priority Actions
- Internal review for clarity

POST - FINAL DELIVERABLE (within 48 hours)

- Finalize Assessment Report: Executive Summary, Key Findings, Risk Heatmap, Recommendations & Roadmap, Priority Actions List
- Deliver report (email or secure link)
- Optional 30-45 minute walkthrough call
- Archive materials and close engagement

DELIVERABLES TO CLIENT

- Executive Summary
- Risk Heatmap
- Recommendations & Roadmap
- Priority Actions List
- Optional Debrief Call