

Technology Project Checklist

Build a clear brief before anyone quotes: the goal, the current environment, timing, and who decides.

For: **Moves, new locations, equipment refreshes**

Time: **about 15 min**

Date: _____

Prepared by: _____

Goal and boundaries

What is changing, and why?

Who and what is affected?

☐ All staff ☐ One department ☐ One location ☐ Customers ☐ Vendors Other: _____

What must still work during the change?

What is outside this project?

Current environment

What is involved?

☐ Computers ☐ Server ☐ Internet ☐ Wi-Fi / network ☐ Phones ☐ Printers ☐ Line-of-business software ☐ Cameras / access control

Other: _____

Business owner and vendor contact for each dependency

What will be reused, replaced, or investigated?

Where is existing documentation?

☐ With us ☐ With current provider ☐ Nowhere ☐ Not sure Other: _____

Timing and dependencies

Desired date and fixed business events

Dependencies

☐ Site access ☐ Internet install ☐ Vendor availability ☐ Equipment delivery ☐ Electrical work ☐ Permits Other: _____

Who can confirm each dependency?

What must be complete before a change window can be agreed?

Decisions and acceptance

Who approves scope?

Which workflows should users check after the change?

Who records unresolved issues and signs off?

Who documents the finished setup and briefs staff?

☐ WOLFTRAXX SYSTEMS ☐ Internal ☐ Both Other:

Next step. Bring this sheet to a conversation with WOLFTRAXX SYSTEMS. Keep passwords and payment details off it. Scope, responsibilities, and any pricing are confirmed in writing. 888.758.8577 · wolftraxxsystems.com/contact