

Project Intake Evaluation Worksheet

A two-page audit for finding shadow channels, missing facts, hidden demand, and decisions nobody recorded.

Page 1 — Audit the request path

Score each statement from 0 to 2: 0 means no, 1 means sometimes, and 2 means consistently. Score the process people actually use, not the policy.

1.

Every request enters through one visible channel.

Email, chat, meetings, and hallway asks point to the same record instead of creating shadow work.

0

1

2
2.

A requestor can submit without a translator.

The path asks for the current problem and owner—not a charter, vendor, architecture, or invented date.

0

1

2
3.

Minimum viable data is enforced consistently.

Every request names what happens today, who is affected, what goes wrong, what better looks like, and who can answer questions.

0

1

2
4.

Requestors can see the next review step.

Confirmation, clarification, estimation, and decision states are visible instead of disappearing into an inbox.

0

1

2
5.

Executives follow the same intake boundary.

Urgent leadership asks may receive faster review, but they do not become work without a written request.

0

1

2

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Page 2 — Audit the decision path

Low scores reveal the first repair. Do not launch a larger form. Choose one boundary your leaders will enforce this month.

1. Triage compares the same facts for every request.

Strategic alignment, impact, timing pressure, confidence, and total capacity demand are visible.

0

1

2
2. Business capacity appears beside technical capacity.

Training, policy, procurement, migration, support, and operational ownership reach the estimate.

0

1

2
3. Every reviewed request receives a recorded decision.

Yes, no, or not yet includes a reason, a decision owner, and the condition for reconsideration.

0

1

2
4. Approved work keeps the original request attached.

Delivery tools organize the work without replacing the problem, questions, estimate, or approval record.

0

1

2
5. Work entering outside intake is measured.

Leaders review bypasses, returned requests, and time to decision so the process can be repaired.

0

1

2

Total score: _____ / 20

0–7: The hidden process is running the portfolio. Start with one door and five minimum facts.
8–14: The path exists, but exceptions or invisible decisions are weakening it. Repair the lowest-scoring boundary.
15–20: The foundation is sound. Audit bypasses and capacity surprises monthly before they become a second process.