Considering a revenue automation solution but not sure where to start? First, you'll need to identify who needs to be involved with the entire process.

**Identify the executive sponsors for the project:**

1. Who owns the project budget?

2. Who will approve the purchase?

3. Who will review and sign the contract?

**Executive Sponsors:**

1. _____
2. _____
3. _____
4. _____
5. _____

6. _____
7. _____
8. _____
9. _____
10. _____

**Identify the project oversight:**

1. Who will be the project manager(s)?

2. Who will champion the sub-processes of the project (technical accounting, data management, IT, etc.)?

**Project Oversight:**

1. _____
2. _____
3. _____
4. _____
5. _____

6. _____
7. _____
8. _____
9. _____
10. _____

## Identify the internal users affected:

1. Who will be using the new solution?

2. Will more than one team be using this? If so, will this solution work for them and their needs?

3. Determine who will be impacted downstream by the new solution (i.e., internal/external reporting needs).

**Teams:**

1. _____
2. _____
3. _____
4. _____
5. _____

6. _____
7. _____
8. _____
9. _____
10. _____

**Users:**

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____

16. _____
17. _____
18. _____
19. _____
20. _____
21. _____
22. _____
23. _____
24. _____
25. _____
26. _____
27. _____
28. _____
29. _____
30. _____

## Identify external resources needed:

1. Who will be the auditors involved for accounting applications and control implications?

2. Who will be the system implementers (i.e., in-house, 3rd party, software vendor)?

3. Who will provide the professional consulting services?

**External Resources:**

1. _____
2. _____
3. _____
4. _____
5. _____

6. _____
7. _____
8. _____
9. _____
10. _____

## Identify the IT systems/management affected:

1. Which systems/processes are currently connected to or reliant on the system that you are replacing?

2. Will the new solution be compatible with your existing systems/processes?

3. Does the new solution need IT management? If so, who would they be?

4. Does IT have bandwidth for this and are there any other competing projects on the roadmap?

**IT Systems/Management:**

1. _____
2. _____
3. _____
4. _____
5. _____

6. _____
7. _____
8. _____
9. _____
10. _____

## Identify the global organizations/business units affected:

1. Do you have more than one company office location? If so, will multiple locations be affected? (If yes, complete this worksheet for all locations affected.)

2. Do you have any business segments that are being accounted for manually and the desire is to automate?

### Global Organizations/Business Units:

1. _____
2. _____
3. _____
4. _____
5. _____

6. _____
7. _____
8. _____
9. _____
10. _____