Checklist

Use the below to support your understanding and implementation of the guidance provided in the GuideBook: IM Program Plan Guideline.

Understanding an IM Program Plan

— Review definitions and concepts related to IM Program Plan

Review and Identify IM Drivers and Business Alignment Requirements

— Identify what is driving IM including the business, legal, regulatory and other compliance requirements as well as identify how the IM Program must align.

Perform Current State Assessment and set Goals and Objectives

— Assess how IM is currently functioning within the organization, identifying any gaps, deficiencies, lessons learned and opportunities for improvement. Set goals, objectives and priorities for IM to lay out what IM must do to support the business strategy, business operations as well as the organization's IM compliance.

Identify Services and Define Service Management Processes

— Identify what IM services (internal and external) will be provided. Consider what IM projects and other IM activities and events will be undertaken as part of the IM Program, and outline how services will be delivered.

Plan Education and Awareness

— Determine what is already in place, what is necessary to development and what activities and events will be undertaken.

Define Resource Requirements

— Determine what resources will be required to deliver the IM Program, including people, funding and facilities.

Establish IM Program Management Framework (including Governance and Organization)

— How will the IM Program be managed and delivered, including resource allocation and management, and IM Service Delivery (including how decisions are managed).

Identify Performance Measurement and Reporting Requirements

— Identify and track how the program is progressing according to the plan, including how and when it will be communicated internally.

Obtain Program Plan Approval, Review and Updates

— The IM Program Plan must have approval from the IM Governance Body and lifecycle managed to reflect organization changes from internal and external sources.

Monitor and Verify

— Review and validate compliance, performance and capacity.