Sponsor meeting worksheet

Bring this to a 30-60 minute meeting with the project sponsor and someone who does the Excel work. Add IT and the trainer where their input will help.

Project / team

Sponsor / project lead / meeting date

30 minutes: outcome 5 | people, process and tools 10 | scope 8 | decisions 7.
For 60 minutes, add a 20-minute workflow walkthrough and 10 minutes for open questions.

1. What should this project change?

Pick one recurring Excel task. Who needs the result, and what would you like to improve?

2. People: who needs to do what differently?

Who is learning, what can they already do, and who will help them put it to use?

3. Process: how will the work happen?

Walk through the handoffs. Who checks the work, sorts out exceptions and signs it off?

4. Tools and technology: what must work?

Which Excel/Copilot tasks need to work? Who in IT will test access and approved files, and when?

5. What is included, excluded and available?

What will the first round cover? What can wait? Agree on time, budget and deadlines.

6. What would count as progress?

Agree on quality checks, time and help needed. Who will collect the before/after results, and when?

7. What are we agreeing to do next?

Proceed, revise or pause? Write down the open questions and next steps, with a person and date for each.