



Many automation projects experience delays, disputes and budget overruns because deliverables are assumed rather than clearly defined.

Use this checklist to ensure everyone understands what is being delivered before work begins.

1



DEFINE SOFTWARE
DELIVERABLES

- ☐ PLC programs included
- ☐ HMI applications included
- ☐ SCADA software included
- ☐ Database configurations included
- ☐ Network configurations included
- ☐ Software backups included
- ☐ Source code ownership defined
- ☐ Licence requirements clarified



Never
assume
software
ownership
is included.



2



DEFINE DOCUMENTATION
REQUIREMENTS

- ☐ Electrical drawings included
- ☐ Network diagrams included
- ☐ Functional Design Specification included
- ☐ Operating manuals included
- ☐ Maintenance guides included
- ☐ Test records included
- ☐ Documentation standards defined
- ☐ Final handover package specified



Poor
documentation
is one of the
most common
complaints
after automation
projects.



3



DEFINE TESTING
DELIVERABLES

- ☐ FAT included
- ☐ SAT included
- ☐ Functional testing included
- ☐ Safety validation included
- ☐ Performance verification included
- ☐ Test procedures agreed
- ☐ Acceptance criteria defined
- ☐ Test records provided



Testing
deliverables
should be
measurable
and
documented.



4



DEFINE COMMISSIONING
SUPPORT

- ☐ Commissioning duration defined
- ☐ Site support included
- ☐ Production restart assistance included
- ☐ Defect resolution process agreed
- ☐ Escalation routes defined
- ☐ Out-of-hours support clarified
- ☐ Resource availability confirmed
- ☐ Handover support documented



Commissioning
support
should never
be assumed.



5



DEFINE TRAINING
REQUIREMENTS

- ☐ Operator training included
- ☐ Maintenance training included
- ☐ Training materials provided
- ☐ Training duration defined
- ☐ Training attendance agreed
- ☐ Refresher training available
- ☐ Competency requirements defined
- ☐ Training records provided



Training
improves
long-term
system
reliability.



6



DEFINE SUPPORT
EXPECTATIONS

- ☐ Support availability defined
- ☐ Response times agreed
- ☐ Warranty periods defined
- ☐ Software support included
- ☐ Spare parts guidance provided
- ☐ Future upgrades supported
- ☐ Service agreements reviewed
- ☐ Escalation procedures documented



The project
does not
end at
commissioning.



7



DEFINE ACCEPTANCE
CRITERIA

- ☐ Deliverables schedule agreed
- ☐ Responsibilities matrix created
- ☐ Acceptance criteria documented
- ☐ Scope boundaries defined
- ☐ Exclusions documented
- ☐ Stakeholder approval obtained
- ☐ Final sign-off process agreed
- ☐ Success measures defined



Everyone
should
understand
what success
looks like
before work
begins.



PROJECT CLARITY SCORE



50+ CHECKED
Excellent project
clarity.



40 – 49 CHECKED
Good preparation
with minor gaps.



30 – 39 CHECKED
Moderate risk of
misunderstandings.



BELOW 30 CHECKED
High likelihood of
disputes and scope
confusion.

THE BENEFITS



FEWER DISPUTES
Reduce
misunderstandings.



**BETTER BUDGET
CONTROL**
Prevent costly
surprises.



REDUCED SCOPE CREEP
Define expectations
early.



FASTER COMMISSIONING
Avoid late-stage
delays.



**IMPROVED STAKEHOLDER
CONFIDENCE**
Keep everyone aligned.

HOW STRATOS HELPS

- ☒ Detailed scope definitions
- ☒ Deliverables schedules
- ☒ Responsibilities matrices
- ☒ Documentation standards
- ☒ Testing procedures
- ☒ Training requirements
- ☒ Support arrangements
- ☒ Acceptance criteria



**DEFINE EXPECTATIONS.
REDUCE PROJECT RISK.**
Speak to an Engineer Today.



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