



Document Type	Phoenix Screen Aid
Title	Executive Summary
Revision	1.0
Effective Date	10/19/26

1.0 SCOPE

This document assists with entering field-level information into the Executive Summary screen in the EPMO Phoenix Project Management System. The purpose of entering this information is to elaborate upon the project and continue with creating the value proposition ultimately captured in a Business Case, and to ensure continued accuracy in describing expected outcomes.

This information is required for the project's Business Case and future procurement actions and is to be maintained as a function of ongoing applied project management.

2.0 COMMON

- The Project Manager (PM) is responsible for all data entry and ensuring the project is fully represented in Phoenix and kept current.
- When unsure, consult with your Project Management Advisor (PMA) for any project related questions or data entry selections. Your PMA will periodically review this information and may recommend changes.
- The contents of this document cover the fields in the Executive Summary screen. Other fields may contain information already populated from elsewhere within Phoenix and inherited here.
- Open your project at [NCDIT EPMO Project Governance & Oversight](#).
- Field icons:

*	Required – no saving or advancing until data entry is satisfied.
🔒	Locked – no data entry is allowed.
▼	Dropdown – click on icon to select from list.
🔍	Search – click on icon to engage search function.
📅	Date – click on icon to engage calendar selection.
🔗	Go to Record – click icon to edit record.

- All other fields are text entry and have edit and length limitations based on purpose or a project's workflow phase.
- ALWAYS Save!

3.0 EXECUTIVE SUMMARY DATA ENTRY

An IT project executive summary provides a clear, concise overview of the project's purpose, goals, and expected outcomes. It highlights the business problem being addressed, the solution approach, key benefits, major risks, and essential timeline or resource considerations. Its purpose is to give leadership a quick, high-level understanding of why the project matters, what it will achieve, and how it will be delivered.

High Level Overview

A brief simplified summary that focuses on the main ideas, goals, or structure of the proposed project without going into detailed explanations, technical specifics, or step-by-step processes. The overview should highlight the essential points so that someone can quickly understand the general concept or direction of the project.

This field is editable up to the point of submitting for the Business Case decision point. Once the Business Case has been submitted, it is locked. It may only be modified with a Change Request that includes a mention of Scope change.



NCDIT Enterprise Project Management Office
Phoenix Project Management System

Document Type	Phoenix Screen Aid
Title	Executive Summary
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This text field is limited to 4000 characters.

System Assessment and Key Findings

A concise evaluation that explains how a system either currently or will perform, identifies strengths and weaknesses, and summarizes the most important insights discovered during due diligence. It should highlight critical issues, gaps, and opportunities that guide decisions for improvements or next steps in establishing the project.

This field is editable up to the point of submitting for the Business Case decision point. Once the Business Case has been submitted, it is locked and no further change may be applied.

This text field is limited to 4000 characters.

Strategic Alignment

Select the type from the provided list:

- Expansion Budget Request Submitted – Select when your agency has submitted an expansion budget request to fund this project beyond what has been appropriated, but the funds have not yet been received. Consult with your agency Finance team for certainty.
- Expansion Budget Funded – Select when your agency has received funding through a completed expansion budget request and those funds are available for use by the project. Consult with your agency Finance team for certainty.
- In IT Strategic Plan – Select when your agency has created an entry in their submitted biennium IT Strategic Plan that identifies this project.
- Legislative Requirement – Select when the agency is statutorily or legally responsible for delivering or satisfying a need.
- Operational Requirement – Select when the agency is bound to deliver or update a solution that meets current operating activities identified by the mission, vision, goals, and objectives of the organization.

This field is editable.

Alternate Solutions Evaluated

A brief assessment of different possible approaches, technologies, or methods that were reviewed and compared during due diligence analysis to determine the best way to meet a project's objectives. It summarizes what options were considered and why certain ones were selected or rejected.

This field is editable up to the point of submitting for the Business Case decision point. Once the Business Case has been submitted, it is locked and no further change may be applied.

This text field is limited to 4000 characters.

3.1 Governor Priorities and Key Agency Goals

Governor Priorities

The statewide list of priorities from the Governor's office used to drive NC business operations, decision making, and investment for the betterment of all North Carolinians. Priorities may differ with each administration, but those selected will be observed for the duration of the project.

Select from the provided Governor Priorities this project will help accomplish.

Agency Goals

A list of the specific, measurable actions or outcomes an Agency must achieve to meet its overall business goals. They break an Agency's purpose into clear, actionable targets that guide planning, execution, and success evaluation.



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Select from the Agency goals the project will help accomplish.

3.2 Project Goals

Project Goals	A list of the primary outcomes the project aims to achieve. Goals should provide clear direction, define what success looks like, and guide planning and decision-making throughout the project. The project should be limited to no more than 15 goals. Each goal is editable and limited to 400 characters.
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3.3 Project Objectives

Project Objectives	A list of the specific, measurable actions or outcomes a project must achieve to meet its overall goals. They break the project's purpose into clear, actionable targets that guide planning, execution, and success evaluation. The project should be limited to no more than 15 objectives. Each objective is editable and limited to 400 characters.
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3.4 Project Deliverables

Deliverables	The tangible outputs or results that the project agrees to produce for the Business Owner. These may include documents, software, reports, features, or any completed items that demonstrate progress and fulfillment of project objectives. For Agile projects, a deliverable also includes any incremental addition of value received by the stakeholder. Do not list project management deliverables or artifacts such as plans, schedules, or status reports. The project should be limited to a manageable number of deliverables that are closely aligned with statutory, agency, or contractual obligations. Each deliverable is editable and limited to 400 characters.
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3.5 Project Assumptions

Assumptions	The conditions, expectations, or circumstances believed to be true for planning and executing a project. Assumptions should outline factors that the team relies on but cannot fully control, helping guide decisions, and highlight potential risks if those they change. If a project, upon completion, is expected to have zero Operations and Maintenance (O&M) costs, an Assumption must be created to clearly describe why. Otherwise, all projects require O&M estimates. The project should be limited to no more than 15 assumptions. Each assumption is editable and limited to 400 characters.
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3.6 Project Constraints



NCDIT Enterprise Project Management Office Phoenix Project Management System

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Constraints

A limiting factor that affects the execution of a project, program, portfolio, or process. Apply discernment to Constraints and Risks. For example, a constraint could be a funding limit while the risk may be if funding was removed.

The project should be limited to no more than 15 constraints.

Each constraint is editable and limited to 400 characters.

4.0 CONTACT EPMO

- EPMO@nc.gov
- [Feedback](#)
- [NCDIT EPMO Project Governance & Oversight](#)