ZBB Checklist

☐ **Decide if ZBB is right for your program or project**. Using the ZBB decision tree will help you decide. You may also want to speak with those in your organization to see if ZBB aligns with the company's goals.

☐ **Understand or create a communication plan**. Prior to leading a project, everyone should understand aspects of communication within the company.

☐ **Identify potential team members and stakeholders**. If the program is just an idea, you should at least have a high-level overview of the potential departments involved. (This will of course be refined once you are in the stage of crafting a proposal)

☐ **Learning Plan** - being involved in a ZBB program requires fundamental knowledge of the ZBB process, as it is unlike other budgeting strategies typically used in the corporate space. Once you are upskilled on the concept, craft a plan to upskill the immediate team who will be involved. This learning plan should include understanding the best practices & benefits of ZBB.

☐ **Create a Cost Estimate** – Crafting your proposal includes understanding how potential activities will roll up to categories. Setting your categories and aligning a budget allows you to drill down to particular activities your program may need.

☐ **Create and Screen Activities** – Listing out each activity to be included in the budget gives some insight as to what resources and departments may be needed to execute the program. This activity list also will help you later identify project stakeholders and key team members.

☐ **Potential Cost Reduction** – Align on your activities by revisiting your list and seeing if there are ways to modify/reduce the cost or remove from the budget. Using the ZBB activity decision tree helps you decide if the activity is necessary.

☐ **Identify Stakeholders** – Walking through categories and activities needed for the program allows you to decide which departments and stakeholders will be involved. These people will be key in your communication plan.

☐ **Develop A Budget Proposal** – Create a budget proposal using all the above steps and data collected. The proposal should include program highlights, metrics, budget allocation, business objectives and any other data points you'd like to call out. Each proposal will look different depending on your company's guidelines.