

# Open Source Project Launch Checklist

## Considerations

- Evaluate possibility of joining an existing open source project
- Evaluate the company's ability to launch and maintain the project using the open source model
- Evaluate the likelihood that other companies may join the project from the start
- Evaluate success factors and set appropriate metrics for the open source project

## Business strategy & plan

- Determine and set goals for your project
- Gather reasons for doing it from stakeholders
- Select code to be considered for the project
- Decide whether the project will include all code for an application or just parts of it
- Create a business case for the selected proposal
- Determine if there is executive buy-in for the move
- Plan resource commitments for developers and funding
- Set budgets for costs, including development time, infrastructure and related expenses
- Gather executives and tech staff for project discussions and decision-making
- Debate and finalize project scope and code selection

## Legal review

- Consider the impact of open sourcing on your company's intellectual property
- Ensure full compliance with open source licenses
- Select an open source license for the source code to be released, document all licensing requirements very clearly in your project
- Decide if you need a contributor agreement
- Consider the possible non-software outputs from the community and the appropriate licenses, such as documentation and specifications
- Decide on any trademark related considerations
- Decide whether there are additional factors to build into your plans for an ecosystem, such as conformance testing

## Technical review

- Remove critical dependencies on non-public components
- Provide documentation and use case examples
- Remove internal comments, references to other internal code, etc.
- Ensure coding style is consistent
- Update copyright notices in source code files
- Add license notice in source code files
- Add license text as a file in the root directory

## Governance and processes

- Define project governance steps and structure
- Set up a code repository, bug reporting, and code testing infrastructure
- Create supporting Slack channels, forums, and Wikis
- Create open lines of communication with contributors for project success

## Branding and marketing

- Set marketing strategy to promote an active contributor community
- Design project logo, color scheme, website, collateral, etc.
- Formalize branding guidelines
- Register social media accounts for the project (Twitter, Facebook, LinkedIn, etc.)
- Register domain names for the project

## Launch and maintain

- Open project and begin development work and contributions process
- Designate a community manager or community advocate
- Ensure any changes to direction or governance are clearly communicated
- Follow best practices of other similar communities
- Encourage and provide opportunities for face-to-face community building