

Project Checklist

There may be times when you find yourself in a situation of great uncertainty, not sure where to begin and where to end. You may be in the middle of a project and wish someone would come along with a checklist and help you pinpoint what you have overlooked – or at least tell you that you have not overlooked anything!

You cannot manage a project from a checklist, but at times it can be useful to carry out your own internal audit before someone else does - especially when you are just starting up a new project or you have stepped into a project halfway through and not really sure what went on before.

There are many different types of checklists. Some focus on a particular aspect of a project and go into great depth whereas others are more generic and high level. The checklist below is by no means an exhaustive list. It seeks to cover the most critical aspects of your project. Use it to highlight potential problem areas and check if there is anything you are currently overlooking or risks you need to be aware of and start mitigating.

Some of the areas may not be directly under your control, but you should never let that hinder you or become an excuse for turning a blind eye. You will always be able to influence things by being proactive and by identifying countermeasures which you can put in place to address a risk or an issue.

“Use your personal relationships and insight to turn around a situation. Always ask; what can I do to change the situation, resolve the issue or mitigate the risk?”

Exercise ...

1. Read through the checklist below and put a tick against all items you are happy about on your current project.
2. For each tick you gain 1 point. At the end of each section, total up your score so that you can identify the areas you need to focus on improving the most.

A. Aims and Objectives

Think about what the aims and objectives are of the project you are currently managing. Visualize the end state and the business benefits the project will deliver. Is everything clear to you and the team and does the business case make sense?

- ✓ Is the strategic context for the project clear and do you know why it is being undertaken?

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- ✓ Is there a real business need for the project?
- ✓ Have you verified that there is a sound, written business case?
- ✓ Are the aims, outcomes and expected business benefits of the project clear and measurable?
- ✓ Are the success criteria clear, congruent and measurable? (E.g. the project must deliver a specific product to a specific level of quality on a certain date and to certain budget in order to be deemed successful).
- ✓ Is the end state of the project easy to articulate and unambiguous?
- ✓ Are the aims and objectives likely to remain stable over the course of the project?
- ✓ Are the aims and objectives documented in the project charter / project definition document?

Total score: _____

A score below 6 indicates that you need to spend further time clarifying and/or documenting the project's goals and objectives.

B. Sponsorship and Management

Look at the management set-up of your project and how effective it is. What is the overall level of commitment and experience from the project sponsor, stakeholders and from yourself?

- ✓ Is the right degree of sponsor and stakeholder commitment in place?
- ✓ Is the project sponsor strong, active and successful?
- ✓ Are the stakeholders supportive of you and the project?
- ✓ Does the sponsor spend sufficient time fostering commitment, securing funding, controlling internal politics and helping resolve conflict?
- ✓ Are you getting the right amount of management attention when you escalate risks and issues and ask for help?
- ✓ Do you have strong and honest relationships with the sponsor and all key stakeholders and do you spend enough time with them on a one-to-one basis?
- ✓ Is there a drive from the sponsor and business owners to pull the end result into the business?
- ✓ Does the sponsor have realistic expectations about what is achievable in terms of time, cost and quality?
- ✓ Do the sponsor and key stakeholders understand the time/cost/quality tradeoffs which they are likely to have to make during the course of the project?
- ✓ Are the stakeholders' goals aligned, i.e. are there no conflicting objectives or personal agendas?
- ✓ Do you as the project manager possess the right level of experience and knowledge to effectively run the project?

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- ✓ Are you committed and motivated and do you have the right amount of drive, attitude and confidence to focus the team and deliver the project?

Total score: _____

A score below 8 indicates that you need to focus on improving the project's sponsorship and management commitment.

C. User Input, Scope and Quality

Take a moment and consider the scope of your project. Has it been documented in sufficient detail and is it clear to everyone? Has the detailed scope been verified by the users and are they adequately involved in the project to assure the quality of the products you are developing?

- ✓ Is the scope of the project clear and has it been documented in sufficient detail so that it can only be interpreted in one way?
- ✓ Do clear statements exist about what is out of scope?
- ✓ Are the detailed functional and non-functional requirements well understood by the project team and have they been signed off by the users?
- ✓ Are user requirements, designs, test cases and test plans stored in a central repository which everyone can access?
- ✓ Do the users and business analysts have a good understanding of the project's domain and business processes?
- ✓ Is there clear traceability between business benefits, requirements and end deliverables?
- ✓ Do the users (or user representatives) have sufficient time and skill to undertake requirements definition, training, user acceptance testing and business implementation?
- ✓ Does the project team have sufficient access to and communication with the end users around detailed requirements and quality?
- ✓ Do the users have a personal interest in the success of the project?
- ✓ Has the team verified that its understanding of the requirements is correct?
- ✓ Do acceptance criteria and test cases exist for all products and features and have they been produced and verified by the end users?
- ✓ Does the project allow for the end deliverables to be built and tested gradually?
- ✓ Are sufficient processes in place to verify that end deliverables match the requirements?
- ✓ Does everyone on the project team contribute to and feel responsible for product quality?
- ✓ Have the users been adequately trained in carrying out user acceptance testing?
- ✓ Have the QA and test approach been determined in sufficient detail and has enough attention been given to non-functional testing such as performance and load testing?

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- ✓ Has sufficient thought been given to how the end products will affect existing business processes and how to handle the transition into the live environment?
- ✓ Has sufficient thought been given to how the product will be supported and maintained after handover?
- ✓ Have you catered for end user documentation and training in connection with the final roll-out of the solution?

Total score: _____

A score below 13 indicates that quality of your end deliverables could be at risk. Tighten the requirements and ensure that what you are building will actually meet the users' needs.

D. Solution and Estimation

Think about the solution you are putting in place for meeting the client's needs and the project's objectives. How are you going to produce and deliver that solution? Have you documented it, estimated it and demonstrated it to the client?

- ✓ Is the solution for achieving the desired business benefits well documented and clear to all team members and stakeholders?
- ✓ Has a proof of concept or prototype been created to prove the validity of the solution and to check that it will meet the core business requirements?
- ✓ Has the solution been demonstrated to the sponsor and key stakeholders at an early stage of the project?
- ✓ Have alternative ways of achieving the desired outcome been considered?
- ✓ Is there evidence that the best tools and technologies have been selected for producing the solution in the most effective way?
- ✓ Have the baseline costs and timescales for implementing the solution been documented in the project charter or definition document?
- ✓ Have all risks, issues, assumptions, constraints and dependencies been made clear to the sponsor and steering committee?
- ✓ Have the requirements been sufficiently analyzed to merit a reasonable estimate?
- ✓ Has the project been estimated using sound estimation techniques?
- ✓ Have different groups of experienced people been involved in the estimation process?
- ✓ Does the estimate and budget cater for activities such as project management, project support, technical/development management, test management, configuration management, business analysis, technical analysis, design, development, rework, functional and non-functional testing, user training, documentation, business implementation, post project support, on-boarding and training of new team members and team building?
- ✓ Has sufficient contingency been factored in to cater for risks and uncertainties?

- ✓ Does a separate budget exist for anticipated change requests?

Total score: _____

A score below 9 indicates that the proposed solution to your client's problem may not be as robust or well understood as it could be. Mitigate this risk by doing a proof of concept or client demonstrations and by fully documenting and estimating the solution.

E. Project Planning

Think about how you plan the project and how transparent the planning process is to other team members. Does your plan reflect the customer's priorities, does it contain sensible milestones and have you factored in sufficient contingency? Is the plan static or do you update it frequently to cater for progress and changes to priorities and scope?

- ✓ Has a project charter or definition document been produced and has the sponsor and steering committee signed it off?
- ✓ Have all the risky parts of the project been analyzed and understood prior to build/ execution work commencing?
- ✓ Are there sufficient resources (time, money, people, facilities and materials) to start or continue the project?
- ✓ Is the project plan realistic and is it appropriately phased with sensible milestones?
- ✓ Do all team members buy into and work to the project plan?
- ✓ Is the planning process transparent and have the right people been engaged in order to secure their commitment to deliverables, estimates and timescales?
- ✓ Does the project plan provide a detailed view of the immediate future and a big picture view of the long term?
- ✓ Are deliverables being prioritized by the business users and does the plan reflect these priorities?
- ✓ Have product based planning principles been used? I.e. are end deliverables traceable in the plan?
- ✓ Are dependencies and risks well understood and accounted for in the planning process?
- ✓ Does the project plan allow for visible early successes and does it deliver incremental business benefits to the users?
- ✓ Does the project plan allow for sufficient end user training and support pre and post implementation?
- ✓ Does the project plan allow for testing and rework of each deliverable?
- ✓ Is the project plan being reviewed and updated regularly to reflect progress and changes to scope and priorities?
- ✓ Is the project plan stored in a central location where everyone can access it?
- ✓ Does the plan take into account that people are not 100% effective in carrying out tasks?
- ✓ Does the plan cater for training, personal and public holidays and does it contain adequate buffer for sickness?

Total score: _____

A score below 12 indicates that your plans or the supporting processes need to be tightened up. Identify which actions you can take to improve visibility and effectiveness of your project plan.

F. Processes and Controls

Take a moment to assess the quality of your processes and controls. This involves everything from identifying and logging risks and issues to making sure that timesheet approvals and costs are effectively managed.

- ✓ Has a suitable project management methodology been chosen and implemented?
- ✓ Is an effective process in place for identifying, analyzing, mitigating and monitoring risks and issues? Do you involve the team and stakeholders in this process?
- ✓ Is an effective scope and change management process in place where a change is assessed in terms of its impact on quality, cost and time?
- ✓ Are all noteworthy scope changes being signed off by the steering committee before being implemented?
- ✓ Is actual cost being tracked and compared to budget and is the forecast being reviewed regularly?
- ✓ Does a robust process exist for approving timesheets and project expenditure?
- ✓ Does an effective process exist for planning the next iteration or phase of the project? Is the team involved in this process?
- ✓ Do regular project reviews take place to assess which processes work well and what needs to be improved upon?
- ✓ Is an effective process in place for testing the project's functional and non-functional requirements where test cases can be easily executed and requirements verified by the team?
- ✓ Does a process exist for logging and resolving defects?
- ✓ Does an effective process exist for assuring quality at a technical/development level and is the responsibility clearly assigned?
- ✓ Does the project have a central and accessible document repository where all information is stored?
- ✓ Are sufficient procedures in place to hand-over the project to end users and support staff post development?
- ✓ Is a process in place for effectively circulating project information to all parties on the project? I.e. does everyone know what is going on, what the priorities are, what the team has achieved overall and who is coming and going on the project team?
- ✓ Are the necessary vendor contracts in place and do you have sufficient controls in place to monitor these vendors?

Total score: _____

A score below 11 indicates that you need to spend further time tightening your project's control processes.

G. Governance and Reporting

Take a moment to think about how the project is perceived and managed by senior stakeholders. How effective are the governance processes of the project and how honest and thorough is your project reporting?

- ✓ Are all key stakeholders part of the project's steering committee (or project board) and are their roles and responsibilities clearly identified, documented and understood?
- ✓ Are the people on the steering committee empowered to make business and resource allocation decisions?
- ✓ Are the steering committee meetings taking place regularly (e.g. monthly) and are they conducted in an effective manner where progress, risks and issues are being reported, decisions made and conclusions documented?
- ✓ Does the escalation process to the sponsor and steering committee work well when it comes to risks and issues you cannot deal with on your own?
- ✓ Do the stakeholders feel accountable and are they effective in turning around actions they have taken on?
- ✓ Are minutes being produced and distributed as a follow up to important meetings?
- ✓ Is there a regular and formal process in place for reporting progress in an honest and open way?
- ✓ Are you keeping all stakeholders up to date with regards to approved changes to scope, plan and budget?
- ✓ Does the project report highlight all of the major risks and issues and does it show how the project is progressing compared to plan?
- ✓ Are project costs being accurately monitored and reported?
- ✓ Are project costs being tracked against available budget and compared to project progress?
- ✓ Are the sponsor and key stakeholders satisfied with the way project progress is being reported?
- ✓ Are all project reports available on a central repository for everyone to access?

Total score: _____

A score below 9 indicates that project governance and/or reporting could benefit from being improved.

H. Team Management

Think about your team and the relationship you have with it. Have you selected the best people for the job and are you giving them optimal conditions for being able to perform at their best? Do you spend sufficient time with your team members and do you focus on people as much as you focus on tasks?

- ✓ Do you actively ask team members for feedback and do you spend sufficient time understanding what motivates them?
- ✓ Do you appreciate and reward contributions?
- ✓ Do you promote a culture of shared ownership and responsibility?
- ✓ Is the project team well organized with clearly identified and understood roles and responsibilities?
- ✓ Is the team motivated and united around a common goal and is there sufficient drive and commitment to get the project delivered?
- ✓ Have the best people been made available for the project?
- ✓ Does the team have a complimentary range of skills and styles?
- ✓ Does the team have sufficient skills and knowledge to effectively deliver the project, including the business knowledge?
- ✓ Has the team been adequately trained in the use of tools, technologies and methodologies?
- ✓ Are succession plans in place to mitigate the risk of key man dependencies?
- ✓ Have key resources been ring fenced to the project and committed full-time?
- ✓ Do you have the right tools, resources and processes in place for effectively communicating with geographically dispersed teams?

Total score: _____

A score below 8 indicates that you need to spend more time with your team, ensuring that the right knowledge, skills, motivation and working conditions are in place.

I. Project Closeout

Think about the last stage of the project where you are officially closing down the project. How effectively is this phase being managed? Are you officially seeking acceptance from the stakeholders and assessing to what extent the project was a success and met its objectives? Are you carrying out a post project review and documenting the findings so that best practices and lessons can be leveraged and shared across the organization?

- ✓ Has the customer accepted delivery of the product(s) and is there a mandate to close down the project?
- ✓ Is a project closeout report being created which lists any outstanding activities or deliverables and how to handle them?

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- ✓ Is the project being officially and effectively handed over to the customer, users and support teams?
- ✓ Is a project review being carried out to analyze and capture what went well, what went less well and whether the project delivered and achieved what it set out to?
- ✓ Are the lessons learnt and findings of the project review being documented and shared with senior executives and project managers across the organization?
- ✓ Are all project artifacts being collected and uploaded to the project's central repository?
- ✓ Are you taking time out to celebrate the successes of the project with the team and stakeholders?

Total score: _____

A score below 5 indicates that you need to pay more attention to effectively closing down and handing over the project.

Questions ...

- Which of the above areas stand out as needing attention?
- Which two areas would have the biggest positive impact on the success of your project if you were to address them?
- What can you do to address them and by when will you do so?

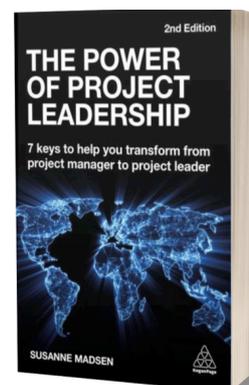


Susanne Madsen is an internationally recognized project leadership coach, trainer and consultant. She is the author of [The Project Management Coaching Workbook](#) (2012) and [The Power of Project Leadership](#) (2015, 2019).

Prior to setting up her own business, she worked for 17 years in the corporate sector leading large change programmes of up to \$30 million for organisations such as Standard Bank, Citigroup and JPMorgan Chase. She is a fully qualified Corporate and Executive coach, an NLP Practitioner, DISC accredited and a regular contributor to the Association for Project Management (APM).

Susanne specialises in helping managers improve their leadership skills so that they can gain control of their projects and fast-track their career. combination of training, coaching, mentoring and consulting.

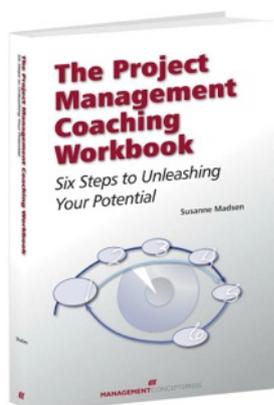
"I loved this book the first time, and the revised edition is even better. Fully updated, this edition goes deep into strategies to help you lead yourself and your team more effectively. The book goes beyond theory - although you can tell the text is well-grounded in research - to give you practical tactics that you can use daily at work. When you combine powerful techniques and a willingness to do the work, you have a blend that will help you excel at delivering organisational strategy through projects. Susanne makes it easy by stepping you through the 'keys' to leadership, and you can pick and choose the approaches you think will make the most difference with your team." Elizabeth Harrin, The award-winning blogger behind [GirlsGuideToPM.com](#)



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REAL NAME



The project Management Coaching Workbook – Six Steps to Unleashing Your Potential.

"If I were to choose ONLY two books to get my job done or do a better job as a PM then the two books I'd hold onto would be the PMBOK and Susanne's Project Management Coaching Workbook. If PMBOK is the theoretical framework, then Susanne's book is the Real World Application.. this is where the rubber hits the road. This is by far the most well written book I have read not only on the subject of Project Management but also from a Get Things Done perspective. The way she explains and assists with the GTD approach is incredible."

—Atif Hassan, Toronto, Canada