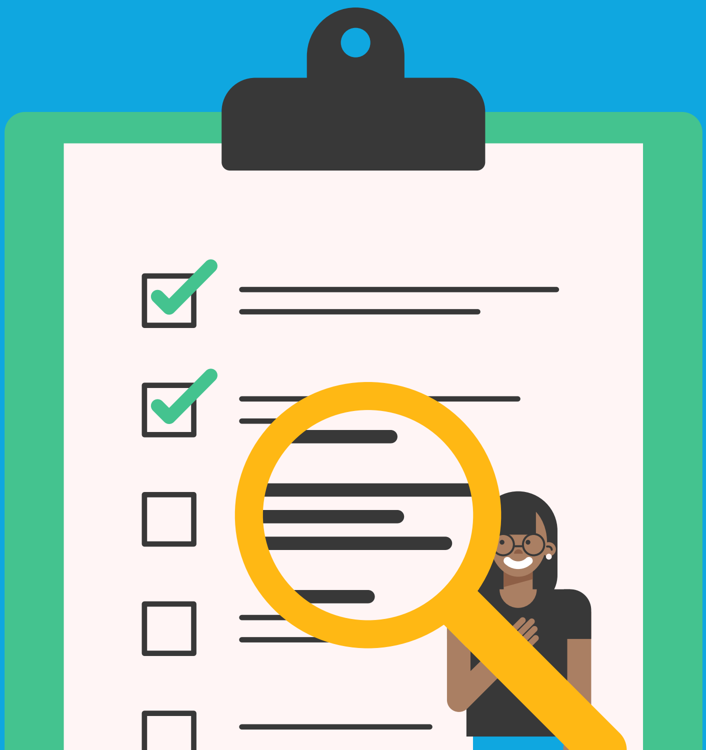
# The Ultimate Project Management Checklist

Everything you need for successful projects.



# So, you want to run more successful projects?

Deliver more value, and manage everything with less stress? For anyone leading projects and managing projects, remembering everything you should be doing is tough.

Remembering what order to do it all in can be even tougher...
...and are you sure of the best way to do it?

That's why I've created this Ultimate Project Management Checklist you can adapt to your projects. It'll help you think through what you need to do and what should happen at the different stages of the project. Through project initiation, setup, planning, and kickoff, I've outlined:

> The **steps, tools and documentation** you need to give your project the best chance of success.
>
> **Checklists** for your daily, weekly and monthly to-do lists so you stay on top of managing and controlling your projects without the stress of figuring out what's next.
>
> **Links to a load of resources** that'll help you learn how to do it.

So whether you're starting a project from scratch or taking over one that's already been started, use this checklist to get yourself and your team geared towards a successful delivery.

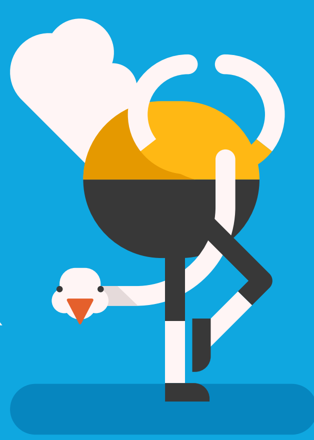
Let's do this!

**Ben Aston**
Project Manager

## PROJECT MANDATORIES CHECKLIST



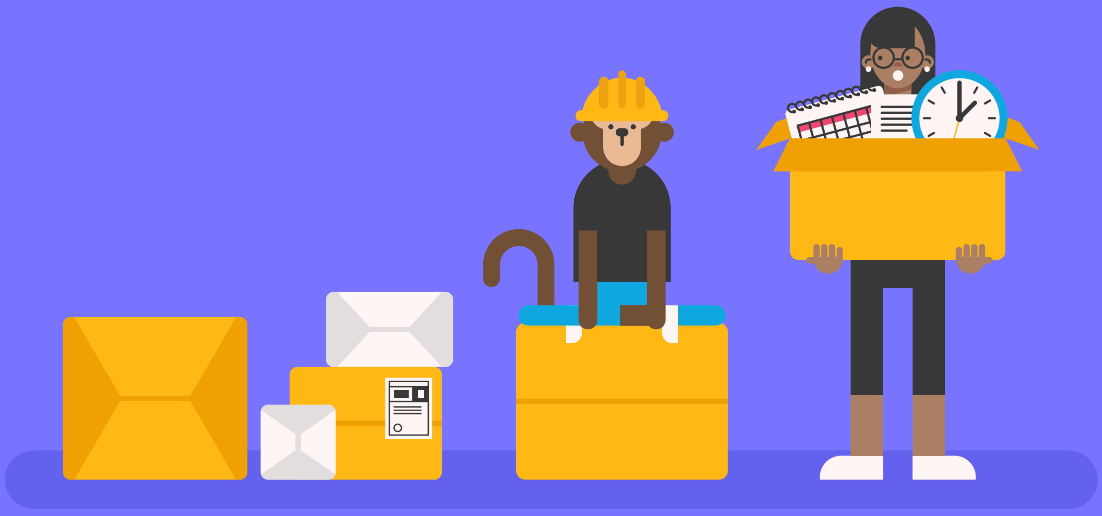
When you see this icon, it means that you can click on the link to get access to amazing extra resources that will help you manage projects successfully.



# Initiate Project

- [ ] Validate project viability
  - [ ] Discuss the brief with the client and define SMART objectives
  - [ ] Ask for requirements, budget, deadline & milestones
  - [ ] Discuss project with Delivery Leads
  - [ ] Provide a ballpark estimate & timeline
  - [ ] Share and discuss with the client
- [ ] Get Client approval on ballpark budget, timeline & requirements

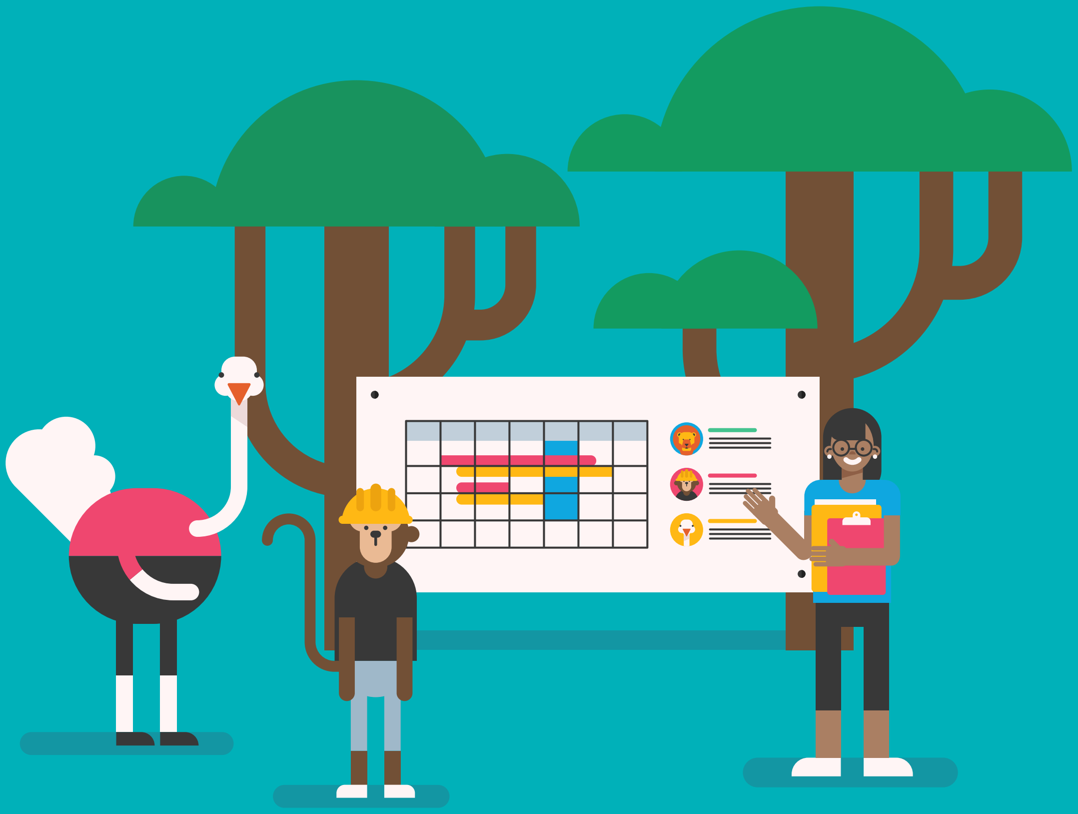
# Setup Project



## SETUP PROJECT

- [ ] Decide on job name
- [ ] Add to Client database
- [ ] Open job number on internal accounting system
- [ ] Set up time tracking tool
- [ ] Set up project folder on server
- [ ] Set up project management tools
- [ ] Create a project brief
- [ ] Get approval of project brief from Delivery Leads & the Client
- [ ] Add tentative resources to resource management tool
- [ ] Add to PPM system with budget, timeline & priority

# Plan Project



## PLAN PROJECT

- [ ] Hold internal project kickoff meeting with Delivery Leads
- [ ] Create project timeline and project plan
- [ ] Obtain 3rd party quotes if required
- [ ] Create project estimate
- [ ] Make resource plan & resource requests to confirm delivery schedule
- [ ] Create statement of work (SoW)
- [ ] Review and get approval from Delivery Leads of estimate, timeline & SoW
- [ ] Ensure documentation is saved & shared on the server
- [ ] Get Client approval of budget, timeline & SoW
- [ ] Save approval of budget, SoW & timeline to server + send to finance

# Kickoff Approved Project

## KICKOFF APPROVED PROJECT

- [ ] Update project management tools with project data & constraints
- [ ] Confirm/adjust resourcing in resource management tool
- [ ] Create kick-off agendas
- [ ] Schedule project kickoffs with Project Team, Client Lead & Client Team
- [ ] Create:
  - [ ] RAID Log
  - [ ] Communications Plan
  - [ ] RACI Chart
  - [ ] Status Report
- [ ] Hold internal kickoff meeting with team
- [ ] Hold pre-kickoff meeting with primary client contact
- [ ] Hold kickoff meeting with Client team
- [ ] Update:
  - [ ] Project Brief
  - [ ] Status Report
  - [ ] RAID Log
  - [ ] Communications Plan
  - [ ] RACI Chart
- [ ] Send contact report with updated documentation from kickoff meeting

# Ongoing
# Project Management
# Tasks

## ONGOING PROJECT MANAGEMENT TASKS

### Daily

- [ ] Write, update & send task briefs to team before they're required
- [ ] Follow up on written briefings with a verbal briefing
- [ ] Schedule internal & external briefings and reviews
- [ ] Check-in with team to clarify progress, deadlines & dependencies
- [ ] Monitor with team the task and project progress vs project plan
- [ ] Check-in with the client a quick project status update
- [ ] Remind team members to update their timesheets
- [ ] Monitor for changes in scope and issue change requests
- [ ] Send contact reports after all meetings and phone calls
- [ ] Save confirmation of approvals of deliverables onto server

## Weekly

- [ ] Run financial reconciliations of estimate vs actual
- [ ] Run project timeline progress of estimate vs actual
- [ ] Review RAID (risks, assumptions, issues, dependencies) with team
- [ ] Update status report and RAID log
- [ ] Send & review status report with Client
- [ ] Review/update resourcing requirements in resourcing tool

## Monthly

- [ ] Send invoices
- [ ] Send Client feedback survey
- [ ] Update reports

# Project Close

## PROJECT CLOSE

- [ ] Ensure the team has submitted their time sheets
- [ ] Ensure all 3rd party invoices are submitted
- [ ] Close job number to prevent additional time and materials being added
- [ ] Complete final project cost reconciliation and bill the client
- [ ] Hold internal post project review to capture lessons learned
- [ ] Hold external post project review with the client
- [ ] Celebrate with the team and Client
- [ ] Close the project in timesheets and project tools
- [ ] Archive project