

PROJECT MANAGEMENT PHASE CHECKLIST

This checklist details the basic phases of a project management process you need to work through and what your actions and responsibilities you must fulfill to ensure your project is successful. The commonly accepted phases of project management are:

1. Initiating
2. Planning
3. Executing
4. Monitoring & Controlling
5. Closing

Every project must follow each these phases logically. First it is conducted at a project level and then is repeated for each phase or sub-phase in more detail.

Initiating Phase - defines the project and any sub-phases it may need, plus gaining authorization for your project to commence. This process develops a Project Charter, which is a document that denotes the formal start to the project and provides high-level details. It includes:

- The reason for your project – Business Case states expected return on the investment and how the end result of the project will improve your organizations performance and meet its strategic goals.
- The objectives it will achieve and how its success will be measured.
- A list of requirements and the budget needed.
- Assessment of risks faced.
- Length of project and its major milestones.
- Level of authority required.
- List of stakeholders involved.
- Name and appointment of your project manager.

Planning Phase - compiles and agrees a detailed scope of your project and its sub-phases. These processes produce the 'Project Management Plan', which integrates all the baselines and management plans required for the project.

- Baselines – scope, schedule & cost performance.
- Management Plans – scope, requirements, schedule, costs quality, process improvement, HR, communications, risk & procurement.
- Change Management plan – details how you will control project changes.
- Configuration Management plan – explains how you will manage any configuration items.
- Quality Management plan – details the acceptance criteria and testing requirements

Your Project Management Plan is a working document and as such will evolve as your project develops. This means that you will issue several version of this plan during your project's life-cycle.

Executing Phase - is where you implement your pre-defined plan and ensure that the planned deliverables are achieved at each sub-phase and for the whole project. These processes are all concerned with 'working the plan' and includes:

- Producing and testing (including independent validation if appropriate) the deliverables.
- Achieve project requirements and milestones.
- Managing project members & suppliers.
- Allocating resources.
- Establish communication channels
- Progress reports & forecasts; including risk & change management.

These processes provide the work performance data – deliverable status, details of incurred costs & schedule progress.

Monitoring & Controlling Phase - is focused on tracking and reviewing your projects progress. It includes the identification, approval and management of any required changes.

- Monitoring actual performance against that of the project management plan.
- Identifying any type of risk that may occur.
- Defining preventive actions as necessary.
- Recommending corrective actions as required.
- Testing, project audits and acceptance criteria to assess amount of re-work being conducted.
- Define and instigate a change request process so that any accepted change is integrated properly into the plan.

Many projects use a Change Control Board (CCB) to manage this process and ensure the appropriate stakeholders are involved and the project aims are achieved.

Closing Phase - relates to the formal signing off and acceptance by your 'customer' or 'end user' of each project phase and the final completion of the project.

- Closure means that the deliverables and exit criteria outlined in the Project Management Plan have been achieved. This applies to each phase and the whole project.
- The 'customer' or 'end user' accepts the maintenance, support and use of the deliverables.
- All the project files show accurate records of all its activities.
- Post implementation review (PIR) is conducted to assess how well the project performed in each phase.
- Lesson learnt are properly recorded for future projects.