



Project Checklist

The following checklist will help you ascertain if you have covered all of the key principles for each phase of your project. This could act as a project health check to ensure all your ducks are in a row, or could be used as a reminder of the activities that need to be undertaken. Enjoy!

Project Start-up

- Understand the over-arching vision (if applicable).
- Have clearly defined benefits, with associated measures that are agreed with – and owned by – the Project Sponsor.
- Have a short list of up to five objectives (no more), with defined success criteria, that are clearly linked to the project benefits, also agreed with the Project Sponsor.
- Remember: if you are not delivering the objectives, you are not delivering the project.
- Understand the competing challenges of time, cost and quality.
- Agree up-front which of them will have the upper hand in decision-making.
- Use the levers available to enable the project to adapt to changes and challenges (“Go faster!”)
- Keep an eye on changes to ensure they are kept to a minimum.
- Start with a scope outline and then build a set of clearly defined requirements to ensure everyone is clear on how the end product should feel.



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- Wherever possible, satisfy yourself that each requirement links back to one of the project objectives.
- Assign a priority to each requirement – you could score them from 1 to 5 in terms of importance, or use a system like MoSCoW ratings.
- Be vigilant for scope creep.
- Ensure everyone on the team has a role and knows their responsibilities.
- Be conscious of the difference between a team member and a stakeholder. Make sure you're aware of who isn't on the team and manage them appropriately.
- Have a RACI – at least in your head.

Design & Planning

- Plan tasks and sequences forwards from a start date, not backwards from an end date (wherever possible).
- Plan to the right level of detail – don't get lost in the weeds.
- Ensure every task has an agreed owner
- Use planning horizons (it's better to be broadly right than precisely wrong).
- Identify your pitons & firebreaks – ensure you have break points that you can fall back to.
- Baseline your plan and then update it regularly. Ensure it adapts to changes as they occur, but do not allow tasks to slip unchallenged.
- Establish a baseline budget and track it in a cost plan.
- Have a simple cost plan that makes sense to you – and update it regularly.



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- Ensure your cost plan is aligned to your schedule.
- Make allowances within your cost plan for contingency and risk, but sacrifice each as you go.
- Allow change to happen but only under control.
- Set baselines and defend them.
- Use a regular report to sum up your progress and check you are staying on top of all the different aspects of your project.
- Know your escalation path and don't be afraid to use it.

Build & Execute

- Listen to the what your team is telling you and watch how they interact with each other (and with you) in order to get the best from them.
- Use your own voice.
- Create and act according to your own authority. Do not invoke the authority of others.
- Be on the lookout for misleading, or downright deceitful, behaviours.
- Ensure the success of your project by supporting your team and ensuring each individual is successful in their role.
- Spend time considering all the things that might endanger the delivery of your objectives.
- Score your risks according to impact and probability, then focus on mitigating each.



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- Be mindful of things that look and sound like risks but are not for your project to fix.
- Budget for risks so that you do not have to find additional funds when a reasonably foreseeable event occurs.
- Implement your mitigations – but don't waste time trying to mitigate every last risk.

Project Closure & Lessons Learned

- Always go back to first principles – what are the objectives? What are the expectations in terms of time, cost and quality? Can we define these without completely stopping?
- Speak to as many people as you can to get a rounded view of what's happened so far.
- Leave the firefighting to the firefighters
- Avoid keeping a dead project alive for the sake of appearances.
- Learn lessons – by making changes.