

# Project Management Checklist Template

Name: \_\_\_\_\_

Owner: \_\_\_\_\_

Deadline: \_\_\_\_\_

Budget: \_\_\_\_\_

Team members: \_\_\_\_\_

Goals: \_\_\_\_\_

Deliverables: \_\_\_\_\_

## Tick the boxes\*

- ☐ Project goals and objectives are clear
- ☐ The project scope is done
- ☐ All project tasks are listed
- ☐ Resources are allocated
- ☐ The project timeline is created
- ☐ The risk management plan is finished
- ☐ The change management plan is finished
- ☐ The communication plan is finished
- ☐ Project management software is selected
- ☐ The project documentation procedure is approved
- ☐ All project-related information is put in a single shared file

\*Make sure to go through the thorough list below, and tick the boxes on this page at the end.

## #1 Defining the project

- ☐ Conduct discussions with stakeholders
- ☐ Gather requirements
- ☐ Understand pains that will be addressed
- ☐ Set project priorities

Write down everything you've discussed and agreed on.

## #2 Project Scope

Write everything down in a short project scope document.

- ☐ Constraints' interconnections are clear
- ☐ Deliverables are outlined
- ☐ The preliminary roadmap is done

## #3 Understanding the workload

- ☐ All project tasks are listed (big or small)
- ☐ Task co-dependencies are clear (preliminary)
- ☐ Task prioritization (preliminary) is done

## #4 Budget

- ☐ Direct and indirect costs are included
- ☐ There is a wiggle room to accommodate additional expenses.\*

\*We recommend adding 10-15% extra if you're experienced, and 20–30% for new project managers.

## #5 Resource allocation

- ☐ All project activities have resources allocated to them
- ☐ Resources are allocated equally to the planned budget

## #6 Timeline

- ☐ All tasks are looked through again and listed on a timeline
- ☐ Co-dependencies are considered in the timeline planning
- ☐ There is minimal wait time or disruption in the timeline
- ☐ Milestones are placed on the timeline

## #7 Risk management

- ☐ All potential risks are identified
- ☐ There is a mitigation/elimination plan for each risk
- ☐ Risks have owners assigned to them
- ☐ There is a shared document with risk owners and their contacts
- ☐ All risks are shared with the team to keep them alert and considerate

## **#8 Change management plan**

- ☐ All possible changes are identified
- ☐ A plan for dealing with those changes is finished
- ☐ Change owners are assigned (who to contact if the change occurs)
- ☐ A list with change owner contacts is shared with the team

## **#9 Communication plan**

- ☐ It is clear who is responsible for what in a project
- ☐ There is a document with everyone's contact details available to the team
- ☐ The methods of communication and basic rules are identified and clear to everyone

## **#10 Software**

- ☐ Project management software is chosen
- ☐ Evaluation of several alternatives is done
- ☐ Testing is complete

## **#11 Project documentation**

- ☐ It is clear who is responsible for documentation
- ☐ There is a schedule for when documentation needs to be updated