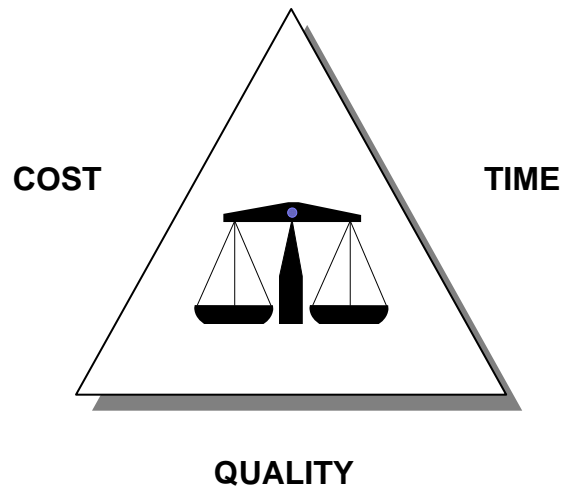




## Project Management Worksheets and Checklists



1. **Set the standards for success – Define the project**
2. **Clarify key steps – Determine the steps and resources**
3. **Obtain resources – Schedule people/acquire materials**
4. **Perform – Implement the plan**
5. **Evaluate the project – Close out**



## Scope Checklist/Worksheet

What is the product/service?

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Who has requested the product/service?

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Who is funding the product/service?

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Why is this being done?

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What deliverables can be identified?

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What are the key constraints re Budget, Schedule, Quality?

Budget\_\_\_\_\_

Schedule\_\_\_\_\_

Quality\_\_\_\_\_

Who will do the work?

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Who is the Project Manager? What authority does s/he have?

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Who else needs to be included in project planning and implementation?

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**Project Start-up Meeting Checklist**

Project \_\_\_\_\_ Date \_\_\_\_\_

Project Manager \_\_\_\_\_

**Meeting Participants**

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**Agenda**

- Discuss the project history with in-house team members.
- Describe the people you will be dealing with.
- Explain any political implications.
- Go over the schedule.
- Discuss critical segments of the project.
- Assign responsibilities.
- Set priorities.
- Brainstorm and discuss opportunities to increase the bottom line.
- Discuss the potential for a long-term relationship with the customer.
- Identify special accounting requirements.
- Identify special safety considerations, if relevant.
- Involve HR in advance if staffing requirements are in question.
- Discuss the value of a project close-out meeting.

Notes \_\_\_\_\_

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## Action Plan

Project \_\_\_\_\_

Objective \_\_\_\_\_

Steps	Time	Materials	Human Resources	Costs	Begin	End
<i>Action Plan</i>						

