Planning Checklist

Project Name

IMPORTANT NOTES

CREATE PROJECT MANAGEMENT PLAN

☐ Ask the project team these questions to document the **knowledge management** plan:

- Who is responsible for managing the project's knowledge assets?
- What types of knowledge should be captured (e.g., learnings, processes, data)?
- When should knowledge be documented during the project lifecycle?
- Where is the knowledge stored (e.g., databases, document management systems)?
- Why is it important to manage knowledge (e.g., to retain critical information, support decision-making)?
- How is knowledge collected, organized, and made accessible to the team?

☐ Ask the project team these questions to document the **change management** plan:

- Who is responsible for initiating and documenting change requests?
- Who reviews and approves change requests?
- What types of changes are allowed?
- What types of changes are not allowed?
- When can changes be requested?
- When are changes reviewed?
- Where should change requests be submitted and recorded?
- Why is a formal change management process important for the project?
- How are change requests submitted, reviewed, and approved?

☐ Ask the project team these questions to document the **lessons management** plan:

- Who is responsible for documenting the lessons learned?
- What types of lessons (both successes and failures) should be documented?
- When should lessons be documented (e.g., after major milestones, at project completion)?
- Where are the lessons learned stored for future reference?
- Why is it important to document these lessons (e.g., for continuous improvement, to avoid repeating mistakes)?
- How are the lessons learned collected and shared with the team and stakeholders?

☐ Ask the project team these questions to document the **scope management** plan:

- Who is responsible for defining and maintaining the scope baseline?
- What processes and tools will be used to create the scope baseline?
- When is the scope baseline developed?
- When is the scope baseline reviewed for changes?
- Where is the scope baseline documentation stored and accessed?
- Why is the scope baseline critical for the project (e.g., to prevent scope creep)?
- How are scope tracking and adjustments made (e.g., project management software, regular meetings)?

- [ ] Ask the project team these questions to document the **schedule management** plan:

  - Who is responsible for creating and updating the schedule baseline?
  - What activities and milestones are included in the schedule?
  - When is the schedule be created?
  - When is the schedule be updated?
  - Where is the schedule be documented and published for team access?
  - Why is the schedule baseline important for project tracking and management?
  - How are schedule tracking and adjustments made (e.g., project management software, regular meetings)?

- [ ] Ask the project team these questions to document the **cost management** plan:

  - Who is responsible for creating and maintaining cost estimates?
  - What costs need to be estimated and tracked (e.g., labor, materials, overhead)?
  - When are cost estimates created?
  - When are cost estimates reviewed and updated?
  - Where is cost documentation stored and accessed?
  - Why are accurate cost estimates critical for the project (e.g., budgeting, financial planning)?
  - How are cost estimate tracking and adjustments made (e.g., spreadsheets, cost estimation software)?

- [ ] Ask the project team these questions to document the **resource management** plan:

  - Who is responsible for identifying and allocating project resources?
  - What resources (personnel, material, financial) are required for the project?
  - When are the resources needed?
  - When are the resources acquired?
  - Where are the resources used?
  - Where are the resources stored, if necessary?
  - Why are these specific resources necessary for the project?
  - How are the resources procured and managed throughout the project lifecycle?

- [ ] Ask the project team these questions to document the **quality management** plan:

  - Who is responsible for overseeing the quality management process?
  - What quality standards and metrics are we using to measure project quality?
  - When do quality assessments take place throughout the project lifecycle?
  - Where are quality documentation and records stored?
  - Why is adherence to quality standards important for this project?
  - How are quality control and assurance activities implemented?

- [ ] Ask the project team these questions to document the **communication management** plan:

- Who is responsible for managing and disseminating project communication?
- What information needs to be communicated (e.g., project updates, milestones, changes)?
- When are communications sent out (e.g., daily, weekly, after major milestones)?
- Where are communications stored for team access (e.g., shared drive, project management software)?
- Why is each piece of information important to communicate (e.g., to maintain transparency, ensure alignment)?
- How is the information communicated (e.g., email, meetings, project management software)?

Ask the project team these questions to document the **risk management** plan:

- Who is responsible for identifying and documenting project risks?
- What potential risks could impact the project?
- What issues have arisen in the past?
- When are risks reviewed and updated in the project lifecycle?
- Where is the risk documentation stored and accessed?
- Why is it important to document and manage risks (e.g., to mitigate potential impacts and ensure project success)?
- How are risks assessed, prioritized, and managed throughout the project?

Ask the project team these questions to document the **procurement management** plan:

- Who is responsible for procurement management
- What personnel, goods, or services need to be procured?
- When do the procurement activities take place in the project timeline?
- Where are the procured items delivered, or services rendered?
- Why are these particular items or services being procured (e.g., necessity, cost-effectiveness, expertise)?
- How is the procurement process conducted (e.g., bidding, direct purchase, RFPs)?

Ask the project team these questions to document the **stakeholder management** plan:

- Who are the key stakeholders for the project?
- Who is responsible for managing stakeholder relationships?
- What are the power and interests of each stakeholder?
- When are stakeholders engaged in the project lifecycle?
- Where do stakeholder meetings and communications take place?
- Why is each stakeholder's involvement important to the project?
- How are stakeholders kept informed and involved in the project decisions and updates?

CREATE TEAM CHARTER

- [ ] Ask the project team what the **team name** should be. Make it fun!

- [ ] Use the approved project charter to document the **team members**.

- [ ] Use the approved project charter to document the **team mission**, ensuring it aligns with the project objectives.

- [ ] Ask the project team these questions to document the **team values**:

  - What company values are most important to you?
  - What do you care about when working in a team?
  - What does success look like to you?
  - What are your standards for high quality work?
  - What environment do you work best in?

- [ ] Ask the project team these questions to document the **team working location**:

  - What is everyone's primary working location?
  - What other locations do folks work from?
  - Will the team travel for work, meetings, presentations, etc.?

- [ ] Ask the project team these questions to document the **team working hours**:

  - What is everyone's core work hours?
  - What holidays will occur during the project?
  - Are there any other days that the project team will be unavailable?

- [ ] Ask the project team these questions to document the **team communication norms**:

  - How do we prefer to communicate for quick questions: email, chat, or phone call?
  - What is our policy on response times for different types of communication?
  - How often should we hold team meetings, and what format should they be in?
  - What are our expectations for documenting meeting discussions and decisions?
  - How do we ensure all team members are kept informed of important updates?
  - What is our approach to giving and receiving feedback within the team?
  - How do we handle confidential information in our communications?
  - Are there any specific tools or platforms we will use for team communication?
  - How do we manage communication across different time zones within the team?
  - What are our guidelines for maintaining professionalism in our communications?

- [ ] Ask the project team these questions to document the **team decision-making** plan:

  - Who drives the decisions making process?
  - Who approves decisions?
  - Who contributes to decisions?

- Who is informed about decisions?
- What expertise does the driver need to have?
- What expertise does the approver need to have?
- What expertise do those consulted need to have?
- Who needs to be informed on a decision?
- What decisions do we need to make?
- When do we need to make decisions?
- Why do we need to make decisions?
- How do we make decisions (e.g., recommend > disagree > decide > commit)?

Ask the project team these questions to document the **team conflict management plan:**

- What has worked for you to resolve conflicts on past projects?
- What has not worked for you to resolve conflicts on past projects?
- How do you like to manage team conflict?

CREATE SCOPE BASELINE

☐ Ask the project team these questions to document the project **requirements**:

- What is the goal or objective of the project? How does this align with our broader business strategies?
- What are the outcomes expected from the project? How will these outcomes impact our team and stakeholders?
- What are the outputs expected from the project? Can you describe the form and function of these outputs?
- What are the requirements for each output? What criteria will determine their success?
- What are the scalability requirements for the outputs? How do we anticipate the project growing in the future?
- Are there any specific branding guidelines that need to be followed? How do these guidelines shape the project's outputs?

☐ Ask the project team these questions to document the project **scope statement**:

- What are the requirements (gathered in an above step)? How do these requirements drive the project's scope and deliverables?
- What are the major phases or key milestones of the project? What are the expected outcomes for each phase?
- Are there any specific items that are out of scope for this project? Why are these items excluded, and how does their exclusion impact the project?

☐ Ask the project team these questions to document the project **work breakdown structure**:

- What is the scope statement (gathered in an above step)? How does this drive the breakdown of tasks?
- What are the specific tasks to complete for each output? Can you outline the steps involved in these tasks?
- What is the estimated effort and durations for each task? How did you arrive at these estimates?
- Are there any risks or challenges to consider for each task? What mitigation strategies do we have in place?
- Are there any external dependencies to consider for each task? How will these dependencies be managed?
- Are there any constraints to consider for each task? How do these constraints impact the task execution?
- Are there any administrative activities to consider? What are the key administrative tasks and their importance?
- Are there any communication activities to consider? How will communication be structured and maintained?
- Are there any procurement activities to consider? What procurement processes will be involved?

- Are there any testing or training activities required for the project? What are the objectives and outcomes of these activities?
- Are there any project closure or handover activities to consider? What does a successful handover look like?
- Are there any other relevant tasks or activities to consider? How do these contribute to the project's success?

CREATE SCHEDULE BASELINE

Ask the project team these questions to document the project **schedule baseline**:

- What is the scope baseline (gathered in an above step)? How does this baseline inform the scheduling of tasks?
- What are the estimated start and due dates for each task? What factors influenced these estimations?
- What lead or lag time should be added to manage uncertainties? How do we calculate and allocate this time?
- How is the project team assigned to each task? What is the process for aligning team members with tasks?
- Are there any critical path activities that have a direct impact on the project timeline? What are these activities, and how do we ensure they are prioritized?

CREATE COST ESTIMATES

☐ Ask the project team these questions to document the project **cost estimates**:

- What is the scope baseline (gathered in an above step)? How does this influence our cost estimates?
- What is the schedule baseline (gathered in an above step)? How does this influence our cost estimates?
- What are the resource quantities needed for each task? Can you provide a detailed breakdown?
- What are the costs associated with each resource (e.g., labor rates, material costs)? How are these costs calculated?
- Are there any subcontractors involved in the project? If so, what are their costs? How do these costs fit into the overall budget?
- Are there any specific tools, equipment, or software licenses needed for the project? If so, what are their costs? Why are these necessary, and how do they contribute to the project?
- Are there any indirect costs (e.g., overhead, administrative expenses) that should be considered? If so, what are their costs? How do we account for these in the budget?
- Are there any travel or accommodation expenses associated with the project? If so, what are their costs? What is the justification for these expenses?
- Are there any licensing or intellectual property costs to consider? What impact do these have on the project's financials?
- Are there any training costs required for the project team? How will this training benefit the project?
- Are there any specific warranties, maintenance, or support costs to consider? What are the terms and expected costs?
- Are there any insurance or legal costs to consider? How do these protect the project?
- Are there any regulatory or compliance costs to consider? What regulations must we adhere to, and what are the associated costs?
- Are there any known risks or potential cost overruns to consider? How are these being mitigated?
- Does inflation or currency fluctuation need to be considered? How will this be factored into the budget?
- Are there any contingency or reserve funds to include? What percentage of the budget should this be?
- Are there any other relevant factors to consider? How might these influence the project's cost estimates?

CREATE RISKS, ASSUMPTIONS, ISSUES, DECISIONS (RAID) TRACKER

☐ Ask the project team these questions to identify the projects **risks**:

- What obstacles, challenges, uncertainties, etc. were gathered in an above steps for scope, schedule, cost, quality, resources, communications, risks, procurement, and stakeholders? How can we mitigate them?
- What contingency plans do we have in place for unforeseen events or emergencies?

☐ Use the approved project charter to document the **assumptions**. Ask project team these questions to identify additional assumptions:

- What assumptions or constraints have been made regarding the project's scope, requirements, or dependencies? How might these influence project planning and execution?
- What assumptions or constraints have been made regarding the project's schedule? What is the basis for these assumptions, and how flexible are they?
- What assumptions or constraints have been made regarding the project's costs and budget? How do these assumptions align with our financial planning?
- What assumptions or constraints have been made regarding the project's resources? How will these assumptions impact resource allocation and management?
- Are there any regulatory or compliance assumptions and constraints that need to be considered? What are the implications for project compliance?
- Are there any assumptions or constraints about external factors, market conditions, or customer preferences? How do these assumptions affect our project strategy?
- Are there any technological or infrastructure assumptions or constraints? What are the potential risks or limitations associated with these?
- Are there any organizational or contractual assumptions or constraints? How do these affect project governance and stakeholder expectations?

☐ Ask the project team if there are any **issues** to consider and how they might impact the project.

☐ Ask the project team if there are any **decisions** to make and what the best course of action is.

PLAN AND FACILITATE KICKOFF MEETING

☐ Ask the project sponsor these questions to plan for the **kickoff meeting:**

- Who should attend the kickoff meeting? Are there any stakeholders or team members whose presence is crucial?
- What are the main objectives for the project kickoff meeting? How do these objectives align with the project's overall objectives?
- What are the agenda items for the project kickoff meeting? Can you provide a brief overview of each item?
- What information should we share in advance of the project kickoff meeting? How will this information prepare attendees for the meeting?
- Are there any specific team building or icebreaker activities to plan for the kickoff meeting? What activities would best foster team cohesion and engagement?
- Are there any key decisions that need to be made during the kickoff meeting? What information or preparation is needed to facilitate these decisions?
- What are the immediate next steps after the kickoff meeting? How do we ensure that these steps are clearly communicated and actioned?

WHAT'S NEXT?

Once you complete these steps to plan your project, you are ready to execute your project. Check out our blog at www.metispire.com for more information on how to execute your project.