

Project Management Checklist

A methodical checklist that walks a project through all five management phases.

Initiation

- ☐ Define the business case and the problem the project solves
- ☐ Identify the sponsor and confirm executive support
- ☐ Draft a project charter with goals and high-level scope
- ☐ Map the key stakeholders and their interests
- ☐ Get formal approval to proceed before any planning starts

Written authorization protects the project later.

Planning

- ☐ Break the scope into a work breakdown structure
- ☐ Build a schedule with milestones and dependencies
- ☐ Estimate the budget and confirm funding
- ☐ Define roles with a responsibility assignment matrix
- ☐ Create a risk register with mitigation plans
- ☐ Agree a communication plan and reporting cadence

Execution

- ☐ Kick off the project with the full team
- ☐ Assign tasks and confirm everyone understands their work
- ☐ Produce the deliverables to the agreed quality standard
- ☐ Coordinate vendors, contractors, and dependencies
- ☐ Keep stakeholders updated against the communication plan

Consistent updates build trust and prevent surprises.

Monitoring and Control

- ☐ Track progress against schedule, scope, and budget
- ☐ Compare planned versus actual performance regularly
- ☐ Review and update the risk register at each checkpoint
- ☐ Run change requests through a formal approval process

Document every scope change and its impact.

- ☐ Adjust the plan and resources when variances appear
- ☐ Verify quality before accepting any deliverable

Stakeholder and Risk Management

- ☐ Re-check stakeholder needs as the project evolves
- ☐ Escalate critical issues to the sponsor promptly
- ☐ Hold regular risk reviews with the core team
- ☐ Keep a decision log so choices are traceable
- ☐ Manage expectations on timing and trade-offs

Closing

- ☐ Confirm all deliverables are complete and accepted
- ☐ Obtain formal sign-off from the sponsor or client

- ☐ Release resources, contracts, and licenses
- ☐ Archive documents, data, and final reports
- ☐ Run a lessons-learned review with the team
 - Capture improvements while memories are fresh.
- ☐ Hand over to operations and close the project formally