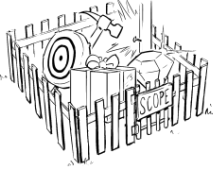






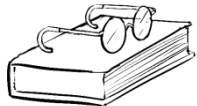










Project Plan Checklist

Topic	Project Plan Checklist Criteria
Project Overview	Are the following items clearly defined: <ul style="list-style-type: none"> • Project name • Project description • Sponsor • Project Manager
Scope 	Goals: <ul style="list-style-type: none"> • Is there a clearly defined project goal? • Is the goal aligned with organizational and departmental strategies? Requirement: <ul style="list-style-type: none"> • Has acceptance criteria been defined for the project and each deliverable? Deliverables: <ul style="list-style-type: none"> • Are all deliverables necessary to achieve the project goals identified? <ul style="list-style-type: none"> • Final deliverables • Interim deliverables • Project management deliverables • Has anything that is excluded from the project been documented? Work: <ul style="list-style-type: none"> • Is the work defined with enough detail to build confidence in project success?
Stakeholders 	<ul style="list-style-type: none"> • Have key stakeholders and their success criteria been identified? • Have strategies to engage each key stakeholder been identified and integrated into the project plan?
Schedule 	<ul style="list-style-type: none"> • Have major milestones been identified for each phase and deliverable? • Has a subject expert been involved in developing the timeline?
Risk 	<ul style="list-style-type: none"> • Is there the appropriate level of risk in the project? • Have project (internal, external and technical) risks been identified? • Has each risk been assessed against the probability of occurrence and the impact on the project? • Have mitigation strategies (proactive) and contingency plans (reactive) been identified for high risks?
Resources 	<ul style="list-style-type: none"> • Are resources identified, like: raw materials, equipment, facilities, and staffing? • Have teaming factors, like: on-boarding, team dynamics, leadership, positive conflict been addressed? • Have specific roles and responsibilities been identified for each team member (like a RACI chart)?
Cost 	<ul style="list-style-type: none"> • Does the budget include all costs associated in achieving the project goal? • Does the project budget impact the business case? • Are authorities for budget changes clearly defined?
Communication 	<ul style="list-style-type: none"> • Is there a detailed plan to ensure that all areas involved in and impacted by the project get the information they need, when they need it?
Knowledge 	<ul style="list-style-type: none"> • Is there sufficient project documentation to capture and share organizational knowledge? • Have the right people been involved in project planning to leverage past knowledge?

Project Roles & Responsibilities

<p>Sponsor/Project Executive:</p> <ul style="list-style-type: none"> • Providing business perspective of the project need and priority • Defining project success criteria • Establishing project completion and budget constraints • Working collaboratively with the Project Manager to document the Project Charter • Identifying key resources necessary for project planning • Supporting the collaborative planning process • Reviewing and approving / rejecting the Project Plan • Providing on-going support for project work • Communicating the continued importance of the project • Communicating organizational changes that could impact the project • Communicating with Steering Committee and Gate Keepers (if they are being used for the project) • Providing feedback on the project process • Clarifying critical issues • Actively supporting the Project Manager and project team • Supporting project closing activities • Determining if the project achieved the agreed upon goals • Willingness to integrate organizational changes based on Closing stage learnings 	<p>Team Member:</p> <ul style="list-style-type: none"> • Participating in collaborative planning process by providing expertise based on past projects and organizational experience • Identifying the work and estimating effort to complete assigned deliverables • Identifying and assessing project risks • Communicating with Project Manager • Completing work assignment and producing project deliverables • Identifying, logging and recommending issue resolutions using the Issue Management procedure • Communicating detailed status of work effort on a predefined format to the Project Manager • Implementing approved scope changes • Participating in closing process by providing feedback on project process 	<p>Project Manager:</p> <ul style="list-style-type: none"> • Clarifying Sponsor expectations • Working collaboratively with the Project Sponsor to document the Project Charter • Facilitating the planning process and the application of project management techniques ensuring that the right individuals are involved in collaborative planning • Documenting the Project Plan • Working with Sponsor and Key Stakeholders (and Executive Sponsor, Steering Committee and Gatekeepers if utilized on the project) to keep them updated on project progress • Establishing Management Plans for managing project related: issues, changes, knowledge, quality, risks and communications • Providing leadership to the project team • On-boarding team members • Meeting regularly with the project team to communicate changing priorities, manage issues, resolve conflict and determine project status • Reviewing and recognizing the contributions of each team member • Managing risks, issues and project changes • Keeping project documentation up to date and completing project related administrative work • Facilitating the closing process documenting project lessons learned and best practices • Willing to integrate changes to the project management process based on the Closing stage learnings 
<p>Steering Committee:</p> <ul style="list-style-type: none"> • Providing cross functional perspective • Working closely with the Sponsor • Providing overall support for project planning and execution 	<p>Subject Matter Expert:</p> <ul style="list-style-type: none"> • Providing subject matter expertise based on past projects and organizational experience 	<p>Gatekeeper/Portfolio Manager:</p> <ul style="list-style-type: none"> • Making project decisions for approval, re-scoping or rejection of project approach • Committing resources and funding to the project • Working closely with the Sponsor 

One person may fill multiple roles. Roles are assigned based on project need. Responsibilities can be delegated.