

Project Management Checklist

Task	Priority	Percent Complete	Due Date	Completion Date	Status	Doney/Oversdue?	Notes	Category
Make sure Handoff Sheet has signed SOW	High	0%			Not Started			Initiation
Review SOW and SW Quote with Sales and/or Solution Architect	Normal	0%			Not Started			Initiation
Assign Tech Resources(s)	Normal	0%			Not Started			Initiation
Create Project Overview	Normal	0%			Not Started			Initiation
Schedule Internal Team SOW Review with Tech Resources and Solution Architect (if needed)	Normal	0%			Not Started			Initiation
Create/Update Project on Active Project List	Normal	0%			Not Started			Initiation
Schedule Initiation Call with Client	Normal	0%			Not Started			Initiation
Prepare Kickoff Presentation and Agenda	Normal	0%			Not Started			Initiation
Create Project Folder/File - upload SOW, Init Order, and Screenings of IG resources	High	0%			Not Started			Initiation
Create Timesheet Entry for Project and/or Client	High	0%			Not Started			Initiation
Confirm Resource Allocation on the Spreadsheet	Normal	0%			Not Started			Initiation
Create Project Schedule	Normal	0%			Not Started			Initiation
Create Project Contact List	Normal	0%			Not Started			Initiation
Obtain Sign-Off on Technical Design	High	0%			Not Started			Design
Create Project Close Document for Customer Excellence	Normal	0%			Not Started			Closeout
Send out Technical Support Policy to Customer	Normal	0%			Not Started			Closeout
Send out Project Acceptance Form	Normal	0%			Not Started			Closeout
Hold Project Close Call with Customer	Normal	0%			Not Started			Closeout
Obtain Signed Project Acceptance Form	High	0%			Not Started			Closeout
Ensure Key Project Documents are in SP	Normal	0%			Not Started			Closeout
Email Closing Info to Various IG Stakeholders	Normal	0%			Not Started			Closeout
Mark project as Complete and enter Completion Date on Active Project List on SP	Normal	0%			Not Started			Closeout
Update Migration, Unity and Custom Code Links if applicable	Normal	0%			Not Started			Closeout
Verify any custom code is stored in the Source Code Vault	Normal	0%			Not Started			Closeout
Update Contact List and send to Inside Sales so they can enter into CRM	Normal	0%			Not Started			Closeout
Close out Project/Tasks on Timesheet Manager	Normal	0%			Not Started			Closeout
Fill out the Project Analysis template and send to Julie	Normal	0%			Not Started			Closeout
Add Project Close Note in CRM	Normal	0%			Not Started			Closeout

Checklist Project Management Tools

Mike Jess



Checklist Project Management Tools:

Project Management Handbook of Checklists Mark J. Hiltz, 1994 *Project Management Tools and Techniques* Deborah Sater Carstens, Gary Richardson, Ronald B. Smith, 2016-04-19 A combination of art and skill that results in the balancing of project objectives against restraints of time budget and quality effective project management requires skill and experience as well as many tools and techniques *Project Management Tools and Techniques A Practical Guide* describes these tools and techniques and how to use them give [Project Portfolio Management Tools and Techniques](#) Parviz F. Rad, Ginger Levin, 2006 Does your organization want to achieve success in prioritizing projects systematically deliberately and logically *Project Portfolio Management Tools and Techniques* is written to demonstrate how to elevate your organization's project management thinking to the level beyond managing individual projects in a standalone fashion This book is for those executives and other project professionals who strive to have a formalized system of authorizing the right projects and abandoning the wrong projects who desire to spend resources in the most efficient manner and who want to have an actionable strategic plan for improving organizational project management sophistication *Project Portfolio Management Tools and Techniques* deals with the full spectrum of project portfolio management PPM functions from selecting projects through formalized portfolio management processes to facilitating the successful execution of projects through creating a formalized project friendly environment This book will aid you in the implementation of a PPM system assist in gaining the necessary commitment from executive management and provide guidelines for the modification of operational practices Get ahead of the game by seeing a comprehensive project portfolio model that can help you establish yours successfully

Project Management Tools David L. Olson, 2024-04-05 This book is devoted to presenting models that have been applied in project management There are a variety of project domains We discuss engineering construction projects software development projects massive projects to include governmental undertakings and pharmaceutical product development Chapter 1 gives an overview of projects and discusses the difficulties in completing projects on time within budget and at designed functionality While the successful completion of a project is a challenge there are some things that can be done to improve the probability of a project's success The book reviews a number of project management concepts These include developing organizational ability to work on projects as discussed in Chapters 2 and 3 Sponsor expectations can be based on better information if a good job of project development estimation and selection is conducted as discussed in Chapters 4 5 and 6 Project planning tools involving the critical path method are covered in Chapter 7 Tools to evaluate project risk are covered in Chapter 8 The critical chain method is covered in Chapter 9 Chapter 10 discusses means to rush projects when circumstances demand to include project crashing as well as Agile and SCRUM approaches used in software engineering projects Chapter 11 covers project implementation and control including assessment of delay responsibility **Project Management Tools and Techniques** Gary L. Richardson, Deborah Sater Carstens, 2019-11-04 The topic of project

management is truly an evolution of art seeking science This activity involves balancing project objectives against the constraints of time budget and quality Achieving this balance requires skill experience along with the use of many tools and techniques which are the focus of this book This new edition provides updated content to incorporate examples from Microsoft Project 2016 and material from the Project Management Body of Knowledge PMBOK Guide sixth edition The chapter structure includes step by step instructions regarding the basic mechanics and various software tools that can be used to assist in the processes To reinforce the textbook s learning objectives extra material is provided on the textbook website This includes mechanical tool examples and lab assignments representative of the chapter topics An external video tutorial library is available to help with various mechanics related to Microsoft Project mechanics An instructor manual is available for qualifying adoptions for classroom use NOTE Chapter 26 is not in the textbook and is only located in the book s Downloads tab on the CRCPress com website Features Illustrates the use of Microsoft Project throughout the project life cycle Offers templates as productivity enhancement tools Includes supplemental material for students and instructors Provides assignments for hands on experience Follows the PMI PMBOK Guide model structure that will support a better understanding of the model and help prepare students for PMP and CAPM certification Illustrates both traditional and contemporary management techniques

The Project Manager's Book of Checklists Richard Newton,2013-10-03 Managers are faced with complex tasks all the time Completing these tasks may require setting up and running a project or on other occasions it may need a short structured action plan A huge amount of approaches exist in thousands of books to help managers complete tasks Occasionally a manager has the time to go off and read a text on a topic like how to manage a project but often they have an immediate requirement to do something now There isn t time to plough through a project management book Usually all that is needed is a simple list of steps a checklist that the manager can read to kick start them into action The core contents of this book will follow a standard project management process starting in initial concept identification and going through to complete implementation At each stage there are tasks and problems that face project managers and for each identified task or problem there will be a checklist Unlike normal project management texts which are written to be read end to end this book is designed to act as an everyday reference source that will be picked up and used every time the question how do I comes into the readers mind The book will sit on a manager s desk at work and be referenced regularly It will become as much an important supporting tool as a book to read

Project Management Checklists For Dummies Nick Graham,2014-11-24 Your must have tool for perfect project management Want to take your career to the next level and be a master of planning organising motivating and controlling resources to meet your goals This easy to use guide has you covered Project Management Checklists For Dummies takes the intimidation out of project management and shows you step by step how to use rigorous self check questions to save significant time and headaches in managing your projects effectively Project Management Checklists For Dummies gives you to do lists hands on checklists and

helpful guidance for managing every phase of a project from start to finish Before you know it you ll be a star project manager as you organise estimate and schedule projects in today s time crunched cost conscious global business environment Includes useful to do lists and checklists to ensure all the necessary steps are completed Offers simple exercises to help clarify needs and requirements along the way Provides templates to complete which can also be downloaded from Dummies com and customised to suit your unique requirements Supplies hints and tips to help you along the way If you re a project manager or any professional charged with managing a project and wondering where to start Project Management Checklists For Dummies is your ready made tool for success *Brilliant Checklists for Project Managers* Richard Newton,2015-01-06 Run every project smoothly successfully and on time This book contains a range of essential checklists for busy project managers each one of which has been developed tested and proven to work Brilliant Checklists for Project Managers quickly provides hundreds of practical tips techniques and strategies based on proven insider knowledge and expertise to help you to deliver brilliant projects Complete your projects successfully on time and within budget Understand and master all aspects of any project Run any type of project no matter what size Quickly find the answers you need just when you need them Everything you need to know think about and do to run your project successfully and efficiently

Project Management Toolkit: The Basics for Project Success Trish Melton,2011-04-08 This book provides you with the tools required to approach and manage projects These effective skills will impact positively on the success of both the projects you are involved with and of your organization Project Management Toolkit introduces the whole project life cycle It is the first of four project management titles that separately build skills in critical PM areas and together provide a powerful project management resource Focused on the needs of engineering and other technical project managers this book recognises that most non routine work completed by an organization is a project A practical hands on guide to aid those tasked with real industry projects not a lengthy theoretical textbook it gets to the point and delivers REAL benefits The book is suitable for both career project managers and those involved with projects intermittently **Handbook of Project Management** Colin Dobie,2020-08-02 The practical approach that Colin Dobie prescribes is as applicable to the experienced project manager as it is anyone entering the field Ernest J Nielsen Brigham Young University USA A no nonsense approach to project management Essential reading for all project managers and project team members Peter Dechaineux Inaugural Chairman Australian Institute of Project Management Australia Excellent coverage of all the material required in easy to follow steps It places activities in logical context Essential reading for China s many project managers Professor Yuan Chairman Asia Pacific Federation of Project Management Colin Dobie has very comprehensively detailed out the intricacies needed to manage projects Well done Adesh Jain President PM Guru Inc and President IPMA Whether you are creating a new product or building a power station you need to know how to manage the myriad elements in a project to ensure it is completed on time on budget and to a high standard A Handbook of Project Management is a practical and comprehensive

guide for project managers working on small and large projects in any field Colin Dobie systematically maps the four phases in the project lifecycle initiation planning implementation and finalisation He outlines the processes and techniques of the nine functions of project management and how they are applied during the project lifecycle He also explains what a project manager is expected to deliver and the roles of team leaders and team members Drawing on international standards and bodies of knowledge as well as Colin Dobie s extensive industry and training experience in several countries A Handbook of Project Management is an indispensable guide for anyone who wants to develop their skills in project management It is extensively illustrated with examples templates exercises and checklists making it valuable resource for experienced project managers

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