Project Management Basics  
Checklist

1. **Ground Rules**

Agree how you will work together: set expectations about responsiveness, decision making, etc.

* Ground rules written and agreed by all team members

1. **Charter/Project Description**

Agree with your sponsor (and professor) about exactly *what* your project will achieve and how you will know you have successfully achieved it. Make sure everyone on the team understands the project and can explain it to anyone concisely and clearly (elevator speech).

* Charter written and accepted by all team members, sponsor and professor
* All team members able to give elevator speech.

1. **Develop Task List**
   1. Define Deliverables

What are the things you need to create in your project? List everything, large and small: reports, meeting notes, presentations, stakeholder analysis, etc. List them in the task list, organizing them by type and ordering them by when you need them.

* 1. Set Milestones

When are the key points in your project that you need to check in with your sponsor and/or professor to make sure everything is on track? Add those to your task list as well (HINT: there’s usually a report or presentation associated with them).

* 1. Set tasks, owners and schedule.

Figure out what has to be done to complete each deliverable and reach each milestone. Working backwards from the project due date and any other dates set by your sponsor or professor, figure out when each task must be complete. Decide who will be responsible for making sure it happens.

Here is an example of how your task list might start. You can easily set up something similar in Word or Excel.

|  | **Status** | **Task** | **Owner** | **Due** | **Comments** |
| --- | --- | --- | --- | --- | --- |
|  |  | **Ground Rules** |  |  |  |
|  |  | Write first draft |  |  |  |
|  |  | Team review |  |  |  |
|  |  | Revise |  |  |  |
|  |  | Turn in to Professor |  |  |  |
|  |  |  |  |  |  |
|  |  | **Charter** |  |  |  |
|  |  | Write first draft |  |  |  |
|  |  | Team review |  |  |  |
|  |  | Revise |  |  |  |
|  |  | Turn in to Professor |  |  |  |
|  |  | Revise |  |  |  |
|  |  | MILESTONE: Sponsor Review & Approval |  |  |  |

* Task list developed and accepted by team as complete enough to use
* Are tasks there to assure regular and appropriate communication with your sponsor

1. **Use the Task list**

Add tasks as you think of them. Update the status as you go. ANY missed due date is cause to re-check your task list and adjust due dates as necessary. Use the Status column to show when tasks are started and completed so you can tell at a glance how things stand. Color coding will help, e.g., use a green “B” to indicate begun and on time, a red “L” to indicate late and a black “C” to indicate Complete. Assign someone on the team to monitor and update the task list so you can find problems before they become crises.

At the end of the project, check the task list to make sure everything is complete—no loose ends, nothing forgotten.

Keep checking:

* Is every task here necessary to achieve success? Remove unnecessary tasks (avoid scope creep).
* Is anything missing? If so, add it.
* Is anything late, or about to be late? If so, make necessary adjustments.
* Is something ahead of schedule? If so, can you move anything forward. You may need that extra time later, so don’t waste it.