

# Project Management Checklist

| Task   | Priority | Plan and Complete | Due Date | Completion Date | Status      | Doney/Overdue? | Notes | Category   |
|--|----------|-------------------|----------|-----------------|-------------|----------------|-------|------------|
| Make sure Handoff Sheet has signed SOW   | High     | 0%                |          |                 | Not Started |                |       | Initiation |
| Review SOW and BR 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 - updated SOW, Init Order, and Screenshot of all screens      | 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 Key Stakeholders   | Normal   | 0%                |          |                 | Not Started |                |       | Closeout   |
| Mark project as Complete and enter Complete Date on Active Project List on SP            | Normal   | 0%                |          |                 | Not Started |                |       | Closeout   |
| Update Migration, Unity and Custom Code Lists 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/Phase 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

**John J. Rakos**



## **Checklist Project Management Tools:**

**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

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

**Real Project Planning: Developing a Project Delivery Strategy** Trish Melton,2011-04-08 Successful projects are the basis for a successful company but many professionals lack the basic skills required to accomplish this The IChemE Project Management Subject Group has recognized the need to provide resources to deliver these skills and has developed a series of books to share the latest best practice engineering essentials This second title though primarily written from the perspective of engineering projects within the process industries is generic enough to support project managers in many other disciplines It provides for those starting out in project management is ideal for students as a university textbook and is also an indispensable reference for established project managers Get up and running on your project quickly and effectively Focuses one step at a time on the needs of engineering industrial and process projects for career project managers and those involved with projects intermittently

[Project Management Checklists For Dummies](#) Nick Graham,2014-09-29 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

**Total Quality Management for Project Management** Kim H. Pries,Jon M. Quigley,2012-08-29 Finding ways to improve margins can be the difference between organizations that thrive and those that simply survive during times of economic uncertainty Describing why cost reductions can be just as powerful as increases in revenue Total Quality Management for Project Management explains how to integrate time tested project management tools wit

[Project Management JumpStart](#) Kim

Heldman,2018-10-16 An informative introduction for those considering a career in project management Project Management JumpStart offers a clear practical introduction to the complex world of project management with an entertaining approach based on real world application Fully revised to align with a Guide to the Project Management Body of Knowledge PMBOK Guide 6th edition this book provides an overview of the field followed by an exploration of current best practices The practical focus facilitates retention by directly linking critical concepts to your everyday work while the close adherence to PMBOK guidelines makes this book the perfect starting point for those considering certification to earn either PMP or CompTIA Project credentials Project management is a top five in demand skill in today s workplace and the demand has spread far beyond IT to encompass nearly every industry any organization that produces goods or services whether for profit or not has a vested interest in ensuring that projects are completed on time on budget and to the satisfaction of the client this is the heart of the project management function Let Kim Heldman bestselling author of PMP Study Guide and CompTIA Project Study Guide walk you through the basic principles and practices to help you build a strong foundation for further training Understand current project management methods and practices Explore project management from a practical perspective Delve into illustrative examples that clarify complex issues Test your understanding with challenging study questions Trillions of dollars are invested in various projects around the world each year and companies have learned that investing in qualified project management professionals pays off in every aspect of the operation If you re considering a career in project management Project Management JumpStart provides an excellent introduction to the field and clear direction for your next steps

**Tools and Tips for Today's Project Manager** Ralph L. Kliem,Irwin S. Ludin,1999 Two former college lecturers whose business experience includes manufacturing telecommunications aerospace and artificial intelligence wrote this useful guide Their book which they abbreviate TnT is an explosive mixture of insider information and effective strategies Each entry takes an average of one page longer versions include graphics and delivers quick insight into the meaning and application of the most current terms in project management today Although directed toward project managers others working in the fields of finance marketing sales and human resources will find this book a useful starting point Gathered in one convenient place are over 150 ideas and strategies delivered in a short to the point style and the common and uncommon terms every project manager has heard seen or been asked to use or define A dynamite must read featuring the most explosive project management terms and concepts for today s project manager

**Software Testing as a Service** Ashfaque Ahmed,2009-09-14 In today s unforgiving business environment where customers demand zero defect software at lower costs it is testing that provides the opportunity for software companies to separate themselves from the competition Software Testing as a Service explains in simple language how to use software testing to improve productivity reduce time to market and reduce costly errors It explains how the normal functions of manufacturing can be applied to commoditize the software testing service to achieve consistent quality across all software projects This up to date reference

reviews different software testing tools techniques and practices and provides succinct guidance on how to estimate costs allocate resources and make competitive bids Replete with examples and case histories this resource illustrates how proper planning can lead to the creation of software that s head and shoulders above the competition

**A Framework to Organize and Classify Predictive Tools for Construction Project Managers** James R. Arneson,1994 Fundamentals of Project Management Rory Burke,2010 Fundamentals of Project Management explains how to use the latest project management planning and control tools and techniques used by the planning software the APM BoK 5ed the PMBOK 4ed and the unit standards level 4 The text uses plenty of worked examples and exercises to explain how to use all the body of knowledge topics and particularly the Project Management Process and the Project Management Plan Target Market Project managers new to project management who are managing projects of limited complexity Project team members who are responsible for performing all the calculations reporting and the administration functions Contractors suppliers and consultants who participate in projects Support Material An INSTRUCTOR GUIDE and POWERPOINTS SLIDES are available upon request

**Implementing the Virtual Project Management Office** Marcus Goncalves,2006-09-13 Globalization and increased outsourcing have redefined project management The complex dynamics involved in today s long distance projects require a new skill set and knowledge base unlike anything needed before Here leading project management expert Marcus Goncalves presents a complete guide to implementing the virtual project management office ePMO Leveraging his information technology expertise and PM experience Goncalves offers cutting edge techniques for managing projects across borders working with colleagues and clients from different cultures and utilizing the necessary telecommunication Internet technologies ePM managers and their virtual teams and remote PM offices must have Implementing the Virtual Project Management Office complies with the Project Management Institute s Project Management Body of Knowledge PMBOK guidelines and extends them to ePMO After analyzing the benefits of ePM versus conventional project management Goncalves presents an in depth discussion of ePM practices scenarios and challenges aided by real world examples and insightful case studies Providing a full focus on the management and execution of virtual projects Goncalves demonstrates the time and cost saving advantages showing how to begin realizing those advantages immediately He gives you Guidelines for building virtual project teams Step by step best practices for keeping an eProject on course Techniques for measuring project performance and earned value eTools for controlling project quality Ways to integrate speed change and innovation for ePM success A customer driven approach to ePM Goncalves provides comprehensive information on developing a state of the art virtual project management office from the necessary structure and environment to the technology He also defines what concurrent ePM is and the need for change management during the process The bonus CD features sample policies forms budgets checklists and software including the award winning Mindmanager from Mindjet to assist in your ePMO implementation

A Guide to the Project Management Body of Knowledge (PMBOK Guide). Project Management

Institute,2000 An update from the 1996 first edition of the reference to generally accepted knowledge in the profession of project management Among the changes are more emphasis on progressive elaboration an acknowledgement of the role of the project office and the expansion of the treatment of earned value management

**Field Guide to Project Management** David I. Cleland,2004-07-29 Publisher Description [Handbook of Image Storage and Retrieval Systems](#)

Marc R. D'Alleyrand,1992 *Project Management for Environmental, Health and Safety Professionals* F. David Pierce,1998-03 Learn the project management skills you need to survive as an EH S professional This book presents a simple to use 18 step approach for effective project management Each of the three phases are explained in detail using case studies to illustrate the best tools to use and pitfalls to avoid You ll learn how to identify project objectives and constraints establish elements and resource needs create project schedules find ways to make up for lost time monitor and measure progress document the project and more

[Project Management \(IPMA®\)](#) Karen Dittmann,Konstantin Dirbanis,2024-03-15 The book contains the complete learning content for the IPMA Level D Certification as well as the GPM Basic Certificate It offers numerous examples templates for project management methods and practical tips It also aims to convey the joy of project management which when carried out professionally is probably one of the most versatile and exciting professions imaginable The IPMA International Project Management Association defines global standards for professional project management The three competence areas of the current standard ICB4 0 Individual Competence Baseline Perspective context People personal and social and Practice methods and technical provide the certification framework for project managers The competence based approach of IPMA enables the transfer into practice and goes beyond the pure knowledge acquisition of other certifications solely based on tools and methods In this way the transfer to everyday project management can be managed successfully Contents Project context how projects are embedded in companies what legal regulations need to be considered the role of organizational culture in project implementation People in the project personal and social skills for project managers how to design projects with people for people Methods and techniques from requirements analysis to performance resource time and cost planning through to project controlling and project closure All topics are explained for both classical plan based and agile project management and how to combine these two approaches hybrid New in the 2nd edition Modernized German standard of the current ICB 4 valid from 01 01 2024 Coverage of agile and hybrid project management Continuous project examples as an aid for writing the Level D report

**Software Project Management for Small to Medium Sized Projects** John J. Rakos,1990 M CREATED *Managing Software Development Projects* Neal Whitten,1995-05-08 This thoroughly updated edition of the bestselling original is short on theory and long on practical hands on advice Packed with realistic scenarios and case studies this book shows readers how to avoid most of the problems encountered in the software development process

**Engineering Program Management** Hans Jurgen Thamhain,1984

Delve into the emotional tapestry woven by in Experience **Checklist Project Management Tools** . This ebook, available for download in a PDF format ( \*), is more than just words on a page; it is a journey of connection and profound emotion. Immerse yourself in narratives that tug at your heartstrings. Download now to experience the pulse of each page and let your emotions run wild.

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