LAUNCH & EXECUTE

PROJECT MANAGEMENT CHECKLIST

Define the work, coordinate ownership, control change, and deliver with discipline.

2026 EDITION | PRACTICAL BUSINESS RESOURCE

01 / PROJECT DEFINITION

Establish the Project Mandate

Define why the project exists, what result it must produce, who owns it, and the boundaries within which the team may act.

Project decision	Definition
Project name	
Business need / opportunity	
Required outcome	
Customer or stakeholder served	
Start and target completion dates	
Executive sponsor	
Project manager	
Decision authority	
Budget authority	
Primary success measure	

One-sentence project mandate

_____

_____

Why this project must be completed now

_____

02 / SCOPE

Define What Is and Is Not Included

Protect delivery by defining outputs, boundaries, assumptions, constraints, and exclusions before detailed work begins.

Scope element	Definition / evidence
Required deliverables	
Included work	
Excluded work	
Customer / user groups	
Locations / markets	
Systems / processes affected	
Quality requirements	
Regulatory / policy constraints	
Key assumptions	
Known limitations	

- ☐ Scope is specific enough to estimate time, cost, and capability.
- ☐ Exclusions are visible to sponsors and stakeholders.
- ☐ Acceptance criteria exist for every major deliverable.
- ☐ Changes require documented evaluation and approval.

03 / DELIVERABLES & MILESTONES

Translate the Outcome into Verifiable Results

Break the project into completed deliverables and milestone decisions. Avoid reporting activity as progress unless it produces accepted evidence.

Deliverable / milestone	Acceptance evidence	Owner	Due	Approver	Status
					Not started
					Not started
					Not started
					Not started
					Not started
					Not started
					Not started
					Not started
					Not started
					Not started
					Not started

Milestone that controls the project completion date

_____

Deliverable with the highest customer or business risk

_____

04 / WORK PLAN

Sequence Activities and Dependencies

Plan work at the level needed for ownership and control. Each task should have a result, owner, timing, dependency, and status.

Task / work package	Required result	Owner	Start	Finish	Dependency	Status

- ☐ The plan includes review, approval, testing, and correction time.
- ☐ Dependencies have confirmed owners and dates.
- ☐ Critical-path tasks have recovery options.
- ☐ No owner has conflicting commitments beyond realistic capacity.

05 / ROLES & GOVERNANCE

Clarify Accountability and Decision Rights

Define who is accountable, responsible, consulted, informed, and authorized to approve or escalate each critical area.

Decision / deliverable	Accountable	Responsible	Consulted	Informed	Approver
Scope and priorities					
Schedule and milestones					
Budget and purchasing					
Deliverable quality					
Customer / stakeholder decisions					
Technology / data					
Risk / compliance					
Change requests					
Final acceptance					
Project closeout					

Escalation path and response expectation

_____

_____

Decisions reserved for the executive sponsor

_____

06 / BUDGET & RESOURCES

Align Capacity with the Work

Confirm funding, people, time, tools, suppliers, and reserves. Update commitments when the resource basis changes.

Resource / cost area	Required	Available / approved	Gap / variance	Action / owner
Internal team time				
Specialist expertise				
Contractors / suppliers				
Technology / equipment				
Materials / inventory				
Travel / logistics				
Training / change support				
Legal / compliance				
Contingency reserve				

Budget control

Category	Budget	Committed	Actual	Forecast	Variance
People					
Suppliers					
Technology					
Materials / operations					
Contingency					

07 / RISK & ISSUES

Anticipate Threats and Resolve Problems

Treat risks as uncertain events and issues as current conditions. Assign prevention, response, ownership, and escalation before impact grows.

Risk / issue	Type	Likelihood	Impact	Prevention / containment	Response / contingency	Owner

Escalation triggers

- ☐ A customer, safety, compliance, reputation, financial, or strategic outcome is threatened.
- ☐ A critical milestone or dependency will miss its recovery date.
- ☐ The team lacks authority, capability, capacity, or information to resolve the issue.
- ☐ The required response changes approved scope, time, cost, or quality.

08 / QUALITY & ACCEPTANCE

Define How Work Will Be Evaluated

Specify standards, review methods, evidence, approvers, correction windows, and final acceptance before deliverables are produced.

Deliverable / process	Quality standard	Review / test method	Reviewer	Correction due	Accepted
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐

☐ Standards are measurable or supported by clear professional judgment.

☐ Reviewers have time and authority to evaluate the work.

☐ Corrections and retesting are included in the schedule.

☐ Acceptance is recorded rather than assumed.

Condition that would prevent final acceptance

_____

09 / COMMUNICATION

Keep Stakeholders Informed and Aligned

Match communication frequency and detail to stakeholder influence, impact, and decision responsibility.

Stakeholder / group	Information needed	Format / channel	Frequency	Owner	Response / decision expected

Core project meetings

Meeting	Purpose	Participants	Cadence	Record owner
Project review				
Workstream coordination				
Sponsor / steering review				
Customer / user review				
Risk / change review				

10 / CHANGE CONTROL

Evaluate and Approve Material Changes

A change is not approved because work has begun. Evaluate effects on scope, outcome, schedule, cost, quality, risk, and capacity before authorizing it.

Change request	Reason / evidence	Scope impact	Time impact	Cost impact	Decision	Owner

Change decision standard

Decision	Meaning
APPROVE	Benefits and necessity justify the documented impact.
APPROVE WITH CONDITIONS	Proceed only after stated conditions are satisfied.
DEFER	Reconsider at a defined milestone or with additional evidence.
REJECT	Do not alter the approved project baseline.

11 / STATUS & CLOSEOUT

Control Delivery and Complete the Project

Use evidence-based status throughout delivery, then formally accept outputs, transfer ownership, resolve obligations, and capture learning.

Status area	On track	At risk	Off track	Evidence / decision
Outcome / value	☐	☐	☐	
Scope	☐	☐	☐	
Schedule	☐	☐	☐	
Budget	☐	☐	☐	
Quality	☐	☐	☐	
Resources	☐	☐	☐	
Risk / compliance	☐	☐	☐	
Stakeholders	☐	☐	☐	

Closeout checklist

- ☐ Deliverables and acceptance evidence are complete.
- ☐ Customer, sponsor, or designated approver has formally accepted the result.
- ☐ Operational ownership, documentation, access, and training are transferred.
- ☐ Contracts, invoices, assets, data, and records are reconciled.
- ☐ Open issues and follow-up actions have owners and dates.
- ☐ Results, lessons, and next decisions are documented.

12 / REFERENCE NOTES

Use Guidance

Scale the checklist to the project’s value, risk, complexity, and stakeholder impact. Maintain one current source for scope, schedule, status, decisions, and changes.

Recommended working sequence

Step	Working action
01	Define the mandate, outcome, sponsor, manager, and decision authority.
02	Establish scope, deliverables, milestones, and acceptance criteria.
03	Build the work plan, dependencies, roles, budget, and resource plan.
04	Create the risk, quality, communication, and meeting controls.
05	Run evidence-based status reviews and document material decisions.
06	Evaluate all changes against the approved project baseline.
07	Complete acceptance, transfer, closeout, and lessons learned.

Final project quality check

- ☐ The required outcome and boundaries are explicit.
- ☐ Deliverables have measurable acceptance evidence.
- ☐ Tasks, milestones, dependencies, and decisions have owners.
- ☐ Budget, capacity, quality, and risks are actively controlled.
- ☐ Status is based on evidence—not effort or optimism.
- ☐ Changes are evaluated and approved before becoming commitments.
- ☐ Closeout includes acceptance, transfer, reconciliation, and learning.

Important: This checklist provides general project-management guidance. Confirm operational, employment, privacy, safety, accessibility, financial, regulatory, contractual, tax, and other requirements for your project and markets.

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