Basic

Project Success Checklist

Instructions

Complete this checklist as you start a project and identify things that should be resolved. Even if you are very busy, taking time each day to address actions you have identified will be a very important investment in making your project successful.

Use the checklist itself as a communication vehicle with your management / sponsor to elicit support. Ask for help on the most important factors for your project.

Use this checklist, as appropriate, with your project team to best position the project for success. For the latest version of this checklist and for more comprehensive checklists and assessments, see [www.manageprojectsbetter.com](http://www.manageprojectsbetter.com).

***Project Name:***

***Customer/Sponsor/Management:***

***Project Manager:***

***Checklist Preparer:***

***Date:***

**Checklist**

1. **Deliverable**  – What will be delivered at the end of this project is well known and the requirements for this deliverable are known.

[ ]  Adequate [ ]  Unknown [ ]  Not Adequate [ ]  Not Applicable

**Notes:**

**Actions Required:**

1. **Project Constraints** – Project constraints in terms of schedule, budget, resource limitations, assumptions, regulatory requirements and all other key factors that will limit or constrain the work on this project are known, documented, communicated to and accepted by all appropriate stakeholders.

[ ]  Adequate [ ]  Unknown [ ]  Not Adequate [ ]  Not Applicable

**Notes:**

**Actions Required:**

1. **A Plan** – The project has a plan that includes a definition of all needed work, team members, work assignments, milestones, schedule, resource needs and other needed plan information is complete, communicated and accepted by appropriate stakeholders.

[ ]  Adequate [ ]  Unknown [ ]  Not Adequate [ ]  Not Applicable

**Notes:**

**Actions Required:**

1. **Accountabilities** – Clear responsibility for all project work, approvals, reviews, tests and other related project activities are defined, communicated, accepted and known to all appropriate stakeholders.

[ ]  Adequate [ ]  Unknown [ ]  Not Adequate [ ]  Not Applicable

**Notes:**

**Actions Required:**

1. **Defined Project Success Factors** – What success means for this project is defined and known by all appropriate stakeholders. Examples can include requirements compliance, schedule attainment, budget is met and the customer considers the project to be successfully completed. Define success factors by finishing the statement: “This project is successful if….”. Project stakeholders must be aware of and agree on the project success factors. Project success factor definition is……

[ ]  Adequate [ ]  Unknown [ ]  Not Adequate [ ]  Not Applicable

**Notes:**

**Actions Required:**

1. **Defined Top Priority** – The most important success factor (top priority) is defined and is known to all appropriate stakeholders. Examples of the top priority can be the quality of project deliverables, meeting schedule, meeting budgets or other factors. The project’s top priority is defined, communicated and accepted by all appropriate stakeholders….

[ ]  Adequate [ ]  Unknown [ ]  Not Adequate [ ]  Not Applicable

**Notes:**

**Actions Required:**

1. **A Project Manager and Leader** – A project manager is defined for this project. The PM has the necessary project management and work related skills to effectively manage this effort. This person is also a leader and is capable of leading the project team to a successful conclusion. The PM is defined and is accepted by all stakeholders including the project team.

[ ]  Adequate [ ]  Unknown [ ]  Not Adequate [ ]  Not Applicable

**Notes:**

**Actions Required:**

1. **Means to Track Progress** – The project has the means to track progress to meeting project goals and provide the deliverable in areas of technical, schedule and budget as is appropriate for this project.

[ ]  Adequate [ ]  Unknown [ ]  Not Adequate [ ]  Not Applicable

**Notes:**

**Actions Required:**

1. **Communication** – The project will be able to adequately communicate with sponsors, management and customers as needed. The project team will have good internal communications.

[ ]  Adequate [ ]  Unknown [ ]  Not Adequate [ ]  Not Applicable

**Notes:**

**Actions Required:**

1. **Resources** – The project has all needed personnel resources, including any required suppliers or vendors. The project has all needed tools, systems, labs / work areas, equipment, office space, workstations, access to experts, access to information and any other resources necessary to complete the work on this project. A means for management support to resolve potential resource issues exists.

[ ]  Adequate [ ]  Unknown [ ]  Not Adequate [ ]  Not Applicable

**Notes:**

**Actions Required:**

1. **Management Support** – Projects need the support from management and sponsor stakeholders to support project success. This support may exist in terms of issue resolution support, advice, moral support and guidance. This project has sufficient management and sponsor support to enable success. The PM and project team are aware of the support available to them.

[ ]  Adequate [ ]  Unknown [ ]  Not Adequate [ ]  Not Applicable

**Notes:**

**Actions Required:**

1. **Your Positive Attitude –** Projects need a positive, constructive and professional attitude at all times. How you present yourself as the PM or team member to management, to your customer, to your suppliers and other key stakeholders will send a clear message of your commitment to doing the right thing on this project to make it successful for your customer and your organization.

[ ]  Adequate [ ]  Unknown [ ]  Not Adequate [ ]  Not Applicable

**Notes:**

**Actions Required:**

**Additional Notes**

*Developed by and Latest Version at*

[www.manageprojectsbetter.com](http://www.manageprojectsbetter.com)

NOTE

This checklist is intended to provide only an initial and very top level view of common success conditions. It is not a replacement for a more comprehensive project assessment that identifies specific root causes for improvements. See [www.manageprojectsbetter.com](http://www.manageprojectsbetter.com) for additional assessments.

**USAGE LIMITATIONS**

*This checklist is provided to the recipient for the purpose of performing a quick and top level evaluation of project conditions for projects within the recipient’s organization. The recipient is authorized to copy, distribute and use this document within their respective organization for this stated purpose. Sale or use of this document for any commercial purpose other than what is stated above, is strictly prohibited unless authorized in writing by the developer named below.*

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