***Improvement Analysis Tool***

Project Success Checklist

*Developed and Provided by*

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

***Improvement Analysis Tool***

*What Every Project Needs*

 Checklist

Project Success Checklist

***Version 2.1 - 2014***

*“A worksheet for project managers to check for the existence common project success conditions and to capture any needed actions to ensure those conditions exist”*

*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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Project Success Checklist

Intent

*This checklist is intended to be used by project managers and management to assess common project success conditions and to identify actions when the state of any success condition is insufficient. The checklist can be used at any time during the project but use during project startup is of greatest value. This checklist can also be used as a communication vehicle between all stakeholders to understand key status conditions that are directly related to project success.*

Instructions to PMs

* 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 this checklist to educate yourself on effective project management methods.
* Use the checklist itself as a communication vehicle with your management / sponsor to communicate status and to elicit support. Ask for help for important issues.
* Use this checklist to communicate key project attributes with your current project team and when new project team members are added.
* During project performance, re-visit the checklist to ensure all success factors remain appropriately addressed and take any needed actions.
* At the conclusion of project startup, revisit the checklist to support project post mortems so lessons learned can be captured to support future projects.

Instructions to Customers, Project Sponsors and Management

* Use this checklist to communicate effective project management methods to your PMs.
* Use this checklist to educate yourself on effective project management methods.
* Use this checklist to ensure your projects have needed success conditions in place.
* Use this checklist to guide the initiation of new projects.
* Use this checklist periodically to assess on-going project conditions.
* Use this checklist as an opportunity to communicate and build an effective working relationship with PMs reporting to you.

***Project Name:***

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

***Project Manager:***

***Checklist Preparer:***

***Date:***

**Checklist Contents**

1. Authorization and Definition
2. Deliverable Requirements
3. Project Constraints
4. Defined Project Deliverable
5. Defined Customer
6. Start and Completion Conditions
7. A Real Plan
8. Accountabilities
9. Project Success Factors
10. Defined Top Priority
11. A Project Manager and Leader
12. A Team
13. Metrics and Controls
14. Managed Risks
15. Effective Communication
16. Team Work
17. Resources
18. PM Infrastructure
19. Management Support
20. Your Positive Attitude

**Checklist**

1. **Authorization and Definition** – The project has an official start approved by one or more stakeholders with that authority. The project has also been sufficiently defined in terms of scope, deliverables, success factors and other key project definition factors to support a successful project.

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

**Notes:**

**Actions Required:**

1. **Deliverable Requirements** – The characteristics or requirements for the primary deliverable are clearly defined, documented, known and accepted by all appropriate project stakeholders.

[ ]  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. **Clearly Defined Project Deliverable** – The primary project deliverable or the primary result or outcome of this project is adequately defined, documented, known to and accepted by all appropriate stakeholders. The term “adequacy” in this situation means that stakeholders have a sufficiently common understanding of the project’s intended results and that this deliverable definition is sufficient in detail to allow needed project work to be defined and a project plan to be developed.

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

**Notes:**

**Actions Required:**

1. **Defined Customer and Customer Role** – The true customer (or customers) that will accept and/or use the project’s deliverable (s) are known. Where multiple customer entities exist (example: customer buyer and customer user), those individual customers and their respective roles on the project are known to the project team.

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

**Notes:**

**Actions Required:**

1. **Defined Start and Completion Conditions** – If this project has not been started, the conditions for the project to start have been defined. Examples of typical start conditions can include the foregoing five items (Checklist Items #1 to #5) along with the availability of resources and an identified project manager and team. Project completion conditions need also to be defined and communicated to the project team and could include conditions such as delivery, system testing complete, installation complete, system operational, etc. Finish the following statement: “This project is complete when the following conditions exist”. Project start and completion conditions are …….

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

**Notes:**

**Actions Required:**

1. **A Real 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. **A Team** – The project team is defined. The team embodies the needed skills and knowledge necessary to perform the project work. The team size is adequate to complete the project as defined by the requirements, schedule and cost constraints. The team is available to work on the project and it is believed that the team members will work together to make the project successful.

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

**Notes:**

**Actions Required:**

1. **Metrics and Controls** – The best means to measure project progress has been defined and implemented. Measurements exist that cover the project’s success factors, meeting project requirements, budget and schedule. Measurements will provide sufficiently accurate and consistent information to allow the PM working with the team to adequately control this project. The PM and the project team agree on the set of metrics to be used and have the necessary skills to acquire, analyze and act on project measurement information. Systems or other metrics status information gathering methods are defined and workable.

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

**Notes:**

**Actions Required:**

1. **Risk Management** – The project manager and team have a defined method to identify, assess and control project risks. Risk management efforts will be (have been) performed consistently during the project period. The PM and team have adequate skills to perform effective project risk management efforts.

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

**Notes:**

**Actions Required:**

1. **Communication** – The project has a defined communication approach for stakeholders. Such communication approaches cover customer communications, management status reporting, supplier communications and project team internal technical and status meetings. The PM and team have adequate communication skills to provide effective communication of project details to appropriate stakeholders.

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

**Notes:**

**Actions Required:**

1. **Team Work** – A trusting and effective working relationship exists amongst the project team members and between the team and the project’s customer and suppliers where appropriate. Where any concerns about constructive working relationships exists, actions have been defined and are being taken to resolve.

[ ]  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. **Project Management Infrastructure** – The organization the project exists within provides necessary and sufficient project management infrastructure elements that can include project management tools, processes, systems, assessments, metrics and expert support as needed to support project success. The PM and project team are aware of these infrastructure resources and have adequate skills to utilize.

[ ]  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**