Project Initiation Checklist

Things to ask at project kick-off

Project Initiation Checklist

Step 1: Understand The Context

- [ ] Why is this project important?
- [ ] What internal and external dependencies should we be aware of?
- [ ] How does this project tie back to company strategy?
- [ ] What are the constraints?
- [ ] What is risky about this project?

Step 2: Understand Requirements

- [ ] What are you expecting the project to achieve?
- [ ] What do you see as the high level objective?
- [ ] Have the project's requirements been documented yet? If so, where? By whom?
- [ ] What is in scope?
- [ ] What is deliberately out of scope and why?
- [ ] What's the solution that has been agreed, if any?
- [ ] What analysis was done about the proposed solutions?

Step 3: Understand Funding

- [ ] How is this project going to be funded?
- [ ] Where is the business case?

Step 4: Understand What Success Looks Like

- [ ] What are the project's success criteria? (Read more about success criteria in my definitive guide to project success criteria)
- [ ] What is most important: time, cost or quality? Or would you rank something else as the defining measure?

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Step 5: Understand The Team

- [ ] Who benefits from the project?
- [ ] Who are the other stakeholders?
- [ ] Have you done this sort of project before? If so, who can I talk to in order to learn about their experiences?

Final Question

- [ ] Is there anything else you'd like to add or think I should know about? (When asked an open question, people give you lots of other information that you wouldn't otherwise have got. Try it!)

Document Your Findings

Whether you call it a Project Initiation Document, a Project Charter, or something else, it's important to write up what you've learned about the background for this project.

- [ ] Create my initial project documentation.

You can use this checklist during your project meetings. For more templates designed to make your meetings faster and more effective, get the Meetings Template Kit.

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