

Project Startup Checklist

Check	Task	Project Phase	Phase	Comments
<input type="checkbox"/>	Collect and compile all existing project documentation.	Pre-Project Planning	1	
<input type="checkbox"/>	Review the Knowledge Repository for reusable deliverables.	Pre-Project Planning	1	The knowledge repository should include AS-IS process descriptions (or templates), previous customizations, reporting requirements. It may include requirement documents from previous implementations.
<input type="checkbox"/>	Select and acquire Project Start Up team.	Pre-Project Planning	1	Identify best available resources. Obtain commitment, if possible.
<input type="checkbox"/>	Brief Start Up Team.	Pre-Project Planning	1	The project team at this stage is made up of project leads and SMEs
<input type="checkbox"/>	Perform initial facilities assessment.	Pre-Project Planning	1	
<input type="checkbox"/>	Draft initial Project Management Plan with approach for Knowledge Management.	Pre-Project Planning	1	
<input type="checkbox"/>	Prepare initial draft of project standards.	Pre-Project Planning	1	Some of these will be business driven, as in software standards, quality standards. Other standards will include project reporting standards, risk and issue identification, risk mitigation and escalation standards.
<input type="checkbox"/>	Develop the time collection procedure and templates.	Pre-Project Planning	1	
<input type="checkbox"/>	Draft the initial version of the Project Orientation Guide.	Pre-Project Planning	1	The Project Orientation Guide will show location, hours, cubicle or room assignments for consultants, if any. High level project description, goals, timeline and identify project stakeholders. Contact information for project staff.
<input type="checkbox"/>	Meet with the client Project Manager, Project Sponsor, and any third party project managers.	Pre-Project Planning	1	This meeting should clarify requirements, goals and challenges which are unclear or not written in the RFP, SOW or other initial project information.
<input type="checkbox"/>	Create Project Library structure and procedures. Include steps for submitting documents to the Knowledge Repository.	Pre-Project Planning	1	
<input type="checkbox"/>	Review the time collection procedures with the client Project Manager for approval.	Pre-Project Planning	1	
<input type="checkbox"/>	Develop and conduct workshop with the client and any third parties to define project roles and responsibilities.	Pre-Project Planning	1	This identifies project leads, roles and responsibilities. Stakeholders must support the commitment of SMEs to the project, or costs are likely to escalate severely.

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<input type="checkbox"/>	Schedule the initial Project Steering Committee (Board) meeting. This is the initial Project Progress Report.	Pre-Project Planning	1	
<input type="checkbox"/>	Develop and issue procedures for Issue Management, Scope Change Management, and Problem Management. Update the Project Standards documents to contain these procedures.	Pre-Project Planning	1	
<input type="checkbox"/>	Prepare initial draft of the Scope, Objectives and Approach document.	Pre-Project Planning	1	Update information from the project charter, RFP or SOW with information from project stakeholder meeting.
<input type="checkbox"/>	Draft the initial work breakdown structure for the project.	Pre-Project Planning	1	
<input type="checkbox"/>	Document the role of the Project Steering Committee (Review Board).	Pre-Project Planning	2	
<input type="checkbox"/>	Review the Project Standards and Procedures for document management and control with the client.	Pre-Project Planning	2	
<input type="checkbox"/>	Present and review the invoicing procedures to the client for approval.	Pre-Project Planning	2	
<input type="checkbox"/>	Conduct the initial Project Steering Committee (Review Board) meeting providing the initial Progress Report and the Steering Committee Role.	Pre-Project Planning	2	
<input type="checkbox"/>	Present and review Scope, Objectives and Approach document to client and request approval.	Pre-Project Planning	2	
<input type="checkbox"/>	Review the processes for Issue Management, Change Control, and Problem Management with the client and request approval.	Pre-Project Planning	2	
<input type="checkbox"/>	Create finance tracking spreadsheets.	Pre-Project Planning	2	
<input type="checkbox"/>	Update the workplan (WBS) for progress and changes.	Pre-Project Planning	2	
<input type="checkbox"/>	Conduct a review of the original bid document with the project team. Resolve any anomalies.	Pre-Project Planning	2	
<input type="checkbox"/>	Schedule regular Project Steering Committee Meetings and gain approval from the client.	Pre-Project Planning	3	

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<input type="checkbox"/>	Determine resource requirements.	Pre-Project Planning	3	Resource requirements include identification of development, test and production databases. Access (read-only) to the present production database / applications. Identify IT personnel in charge of access rights, determine roles for setups. Determine process for Oracle Support contacts. Obtain commitment for client SMEs and client project leaders.
<input type="checkbox"/>	Prepare the final version of the Project Orientation Guide.	Pre-Project Planning	3	
<input type="checkbox"/>	Prepare a draft of the monthly reports and review with the client for approval.	Pre-Project Planning	3	
<input type="checkbox"/>	Conduct review of the Project Management Plan by the Project Team.	Pre-Project Planning	3	
<input type="checkbox"/>	Develop content and schedule the Project Kickoff Meeting. Obtain approval from the client.	Pre-Project Planning	3	
<input type="checkbox"/>	Establish dates for Project Healthchecks, audits, and Knowledge Management reviews. Include all of these in the project WBS.	Pre-Project Planning	3	
<input type="checkbox"/>	Review the Project Management Plan with the client for approval.		4	
<input type="checkbox"/>	Distribute the Project Orientation Guide.	Project Startup	4	
<input type="checkbox"/>	Conduct the Project Kickoff Meeting.	Project Startup	4	Project kick-off should be upbeat and enthusiastic while presenting an accurate vision of project goals and challenges.
<input type="checkbox"/>	Publish the Project Management Plan.	Project Startup	4	
<input type="checkbox"/>	Conduct the first Project Review.	Project Startup	4	
<input type="checkbox"/>	Issue the first Project Status Report to project team, internal stakeholders and the client.	Project Startup	4	