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From the book "Starting a Project - A Step-by-Step Guide on how to Plan a Project within a corporate environment" by Frederick King

## Consolidated checklist for project preparation

### 1. Define the project objectives and scope

- Project objectives and scope (deliverables and measures) are defined.
- It is defined as what is not included in the project scope.
- If needed: Interviews were conducted with all steering committee participants and relevant stakeholders regarding project goals and scope.
- Project goals and scope are agreed upon with steering committee participants before the first steering committee.

### 2. Determine the project sponsor

- The project sponsor has been named and has agreed to be the project sponsor.
- Actual organizational charts of participating departments and companies can help you if you do not know, who will be participating in the project.

### 3. Identify and analyze the relevant stakeholders

- Stakeholder analysis is conducted within the project team before the start of the project.
- Stakeholder analysis is discussed with trustful colleagues, who can assess if there are any more stakeholders or consequences for the project.
- Consequences and implications from the stakeholder analysis are applied and considered in further project preparation and work.

### 4. Define and coordinate the project resources

- All project members have been appointed and informed accordingly about the project and their tasks.
- Written assurance (for example, via e-mail) was obtained from the managers and supervisors for the project staff (project, name of employee, capacity, duration).
- Budgets were requested and released as needed from the required departments.
- If needed, a project room and additional meeting rooms were reserved for the duration of the project.
- If necessary, the project was approved by the relevant departments (if necessary, this also happens only in the steering committee kick-off (see Chapter 7)).

### 5. Determine the project organization

- Project roles and responsibilities are defined.
- Committees and responsibilities are defined.
- Appointments and meetings are defined in the project and set.
- Working mode and project rules are formulated:
  - Permissions and accesses for the project tools have been requested.

- Appropriate tools were prepared and set up, e.g., an MS SharePoint was provided for the project and prepared by the PMO.
- File naming and version conventions are defined.
- Documentation standards are defined.

Project plan (who does what by when) is written and reconciled within the project.

## **6. Define the project reporting and the project continuation criteria**

- Define project reporting and prepare it for the project with a small explanation of what you value as a project manager.
- Define project continuation criteria and quality gates (e.g., the steering committee).
- Have the project continuation criteria approved by the steering committee members in the first steering committee. If necessary, show why this is necessary (e.g., to avoid the project exceeding timelines or budgets).

## **7. Prepare and conduct the first steering committee**

- Define rules for decision-making for the steering committee.
- Coordinate and set a date for the first steering committee including other steering committees with steering committee members and especially the project sponsor.
  - At the same time, ask for a date for the project kick-off, which the project sponsor should attend, to communicate the expectations to the project team (see Chapter 9 "Prepare, conduct, and follow up on the project kick-off").
- Send the entire first steering committee presentation to all steering committee members in advance (at least five business days) so that there is sufficient time to receive feedback before the steering committee.
- If necessary, hold a meeting to pre-coordinate content with steering committee members.
- Document the first steering committee by sending the final steering committee presentation and minutes to all steering committee members with a request for feedback by three working days. While this has already been written into the rules of decision-making, a brief reminder with a deadline helps.

## **8. Additional tips before starting the project**

- Find a project coach or mentor with whom you can confidently share ideas and risks about the project.
- Think about what the project culture should look like in your project and live it from the beginning. Remember former project leaders with whom you enjoyed working. Remember, you don't always have to be in the spotlight as a project manager. Success is always celebrated together.
- Set up risk management before the project begins so that you are prepared when the first risks arise.
- Schedule a "lessons learned workshop" after project completion early in the project so you can learn and grow through constructive feedback.

## **9. Prepare, conduct, and follow up on the project kick-off**

- The project sponsor is invited to the project kick-off.
  - Depending on the company size and the level of the project sponsor, coordinate the meeting with his or her assistant or directly with him or her.
  - Make sure the project sponsor is clear on that to communicate. Focus on the project goals and expectations.
- The project kick-off presentation should be sent to all project team members at least 48 hours before the meeting so that they can review the slides in advance and provide constructive feedback at the meeting or ask questions.
- The presentation contains all standards of the project organization as well as other relevant slides so that the project team can start straight away with the project work directly afterward.
- After the project kick-off, the updated presentation with the minutes is sent to all project members and stored centrally for everyone on the project SharePoint (or equivalent).