

Checklist

Set-Up a New Project

No matter what your business is looking to achieve, a well-structured plan will help to align goals, manage risks, and ensure efficient use of time and budget. By taking the time to establish a solid foundation, you can avoid costly mistakes and keep your projects on track.

Use the checklist below to make sure you've covered the key elements in your planning so that you can launch your project with the best chance of its success.

Project Objectives and Scope

- ☐ I have clearly defined and recorded the objective of the project.
- ☐ I have outlined the key deliverables and expected outcomes.
- ☐ I have identified what is in scope and out of scope for this project.
- ☐ I have confirmed that the project aligns with my organisational or business goals.

Schedule and Timeline

- ☐ I have identified key milestones and set realistic deadlines.
- ☐ I have developed a high-level project timeline.
- ☐ I have determined dependencies between tasks and deliverables.
- ☐ I have assigned responsibilities for tracking and updating the schedule.

Budget and Cost Management

- ☐ I have estimated the overall project cost, including labour, materials, and overheads.
- ☐ I have secured approval for the project budget.
- ☐ I have established a process for tracking expenses and managing cost variances.
- ☐ I have identified potential financial risks and developed contingency plans.

Quality Management

- ☐ I have defined the quality standards and criteria for project deliverables.
- ☐ I have identified key quality control measures to be implemented.
- ☐ I have assigned responsibility for monitoring and ensuring quality.
- ☐ I have set up a process for reviewing and approving project outputs.



Resources and Team Management

- ☐ I have identified the required resources, including personnel, equipment, and materials.
- ☐ I have assigned roles and responsibilities to project team members.
- ☐ I have confirmed resource availability.
- ☐ I have planned for potential resource shortages or constraints.

Communications and Reporting

- ☐ I have identified all key stakeholders and their communication preferences.
- ☐ I have established a communication plan for updates, meetings, and reporting.
- ☐ I have defined the frequency and format of project status updates.
- ☐ I have assigned responsibility for managing project communications.

Risk Management

- ☐ I have conducted a risk assessment to identify potential issues.
- ☐ I have prioritised risks based on impact and likelihood.
- ☐ I have developed mitigation strategies and contingency plans for major risks.
- ☐ I have set up a process for ongoing risk monitoring and response.

Procurement and Vendor Management

- ☐ I have determined if external vendors or suppliers are needed.
- ☐ I have identified procurement requirements and processes.
- ☐ I have reviewed contracts and agreements for compliance and risks.
- ☐ I have assigned responsibility for managing vendor relationships and performance.

Stakeholder Engagement

- ☐ I have identified all project stakeholders and their level of influence on the project.
- ☐ I have assessed stakeholder expectations and concerns.
- ☐ I have developed a stakeholder engagement and management plan.
- ☐ I have established regular touchpoints to maintain stakeholder alignment.

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