Project Management Best Practices

Intake / Assessment

- ❑ **Identify the following:**
  - ❑ Customer
  - ❑ Problem / Gap Analysis
  - ❑ Project Type - category - classification
  - ❑ Alignment with strategic objectives
  - ❑ Business impact/opportunity
- ❑ **Project cost/level of effort**
- ❑ **Analyze feasibility**
- ❑ **Make Recommendation**
  - ❑ If Yes - scope & initiate
  - ❑ If Hold/Defer - enter into backlog
- ❑ **Enter status on all tracking platforms**

Scope & Initiate
- ❑ **Agree on and document the following:**
  - ❑ Product or Project Manager
  - ❑ Sponsor/Stakeholders
  - ❑ Timeframe
  - ❑ Project Team Members
  - ❑ Scope
  - ❑ Measures of Success
- ❑ **Schedule kick-off**

Health Checklist

- ❑ **Team engagement**
  - ❑ Observed
  - ❑ Addressed
- ❑ **Scope reviewed**
  - ❑ Potential future opportunities logged
- ❑ **Key risks / blockers**
  - ❑ Identified
  - ❑ Mitigated
- ❑ **Milestones status**
- ❑ **Key stakeholders informed**

Close Out

- ❑ **Project Objectives Completed**
- ❑ **Agreement reached on:**
  - ❑ Owner of project output
  - ❑ Service/support of project output
- ❑ **Capstone deck completed**
- ❑ **Close-out meeting held with project sponsor**
  - ❑ Results
  - ❑ Process
- ❑ **Lessons learned shared with team**
- ❑ **Final status updated on all tracking platforms**
- ❑ **Project documentation archived in KM repository**
- ❑ **Project celebrated**

Capstone Deck
- ❑ **Deck checklist:**
  - ❑ Project Overview
  - ❑ Opportunity/Problem Statement
  - ❑ Objectives
  - ❑ Approach
  - ❑ Outcome - Results
  - ❑ Measures of Success
  - ❑ Metrics