



Your Company Name

Initiate Project Checklist

Date

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Revision History

Date	Version	Author	Change

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1 Purpose

The purpose of the Initial Project Checklist is to provide sample information to use and to verify that major initial project functions and tasks have been completed within the Concept Phase.

2 Systems Development Lifecycle

The following table shows a quick summary of the systems development lifecycle (SDLC).

Phase #	Phase Name	Description
0	Concept	Project Definition Business Case Feasibility Study Project Charter Project Team Setup.
1	Initiation	Project Definition and Requirements Planning Scope and Tradeoffs Scheduling Costs Estimating Team Communication.
2	Development / Execution	Ongoing Planning Specifications Design Development Tracking and Control Reviews Testing.
3	Approval	User Acceptance Testing Implementation Planning.
4	Delivery	Project Implementation



Phase #	Phase Name	Description
		Completion Close-Out Activities.

2.1 Project Concept Phase Checklist

This Phase is the first phase in the Project Management Life Cycle. You can start a new project by defining its objectives, scope, purpose, and deliverables to be produced. When the information is approved you can start the next phase.

Note: Based on project necessity, cost, timeline, corporate policy, and management procedures may not require all tasks to be performed.

Task	Work Items	Completed
<i>Mission Statement</i>	<i>Project objectives.</i>	
<i>Market / Opportunity Assessment</i>	<i>Analyze potential market, current customers, and project to objectively assess its potential benefits.</i>	
<i>Business Case</i>	<i>Research business problem or opportunity.</i>	
	<i>Identify solutions and alternatives.</i>	
	<i>Indicate benefits and costs.</i>	
	<i>Recommend a preferred solution.</i>	
	<i>Identify risks and issues.</i>	
	<i>Present solution for funding approval.</i>	
<i>Feasibility Study</i>	<i>Research the business problem, opportunity, and risks.</i>	
	<i>Document project / solution requirements.</i>	
	<i>Identify solution alternatives.</i>	
	<i>Review each solution's feasibility.</i>	
	<i>List risks and issues.</i>	
	<i>Select solution(s).</i>	
	<i>Document study results.</i>	
<i>Project Charter</i>	<i>Research business problem or opportunity.</i>	



Task	Work Items	Completed
	<i>Document business requirements.</i>	
	<i>Identify alternative solutions.</i>	
	<i>Review each solution to determine its feasibility.</i>	
	<i>List risks and issues associated with each solution.</i>	
	<i>Select a preferred implementation solution.</i>	
	<i>Document charter results.</i>	
<i>End of Initial Phase Management Review or Signoff</i>	<i>Go (start project)</i> <i>No-Go (do not fund project – shelve project concept)</i> <i>Hold (keep project concept active but do not proceed with next phase)</i>	
<i>Project Team</i>	<i>Define role purpose.</i>	
	<i>List key roles responsibilities.</i>	
	<i>Define who the role will report to.</i>	
	<i>Identify Project Manager and Project Sponsor(s).</i>	
	<i>Identify key functional sub-team leads (cross-functional project team members).</i>	
	<i>Create an organizational chart.</i>	
	<i>List required skills and experience.</i>	
	<i>Define relevant qualifications.</i>	
	<i>Define important performance criteria.</i>	
<i>Project Schedule</i>	<i>Prepare a basic project schedule with phases, deliverables, milestones, dependencies, resources, etc.</i>	
<i>Phase Review</i>	<i>Identified whether project is on schedule.</i>	
	<i>Monitored and controlled allocated budget.</i>	
	<i>Produced and approved deliverables.</i>	
	<i>Monitored, controlled, and mitigated risks.</i>	
	<i>Identified and resolved issues.</i>	
	<i>Managed changes appropriately.</i>	



Task	Work Items	Completed
	<i>Tracked project schedule and timeline.</i>	

2.2 Sample Project Documentation

The following is a sample list of project documentation that can be used on a project.

- Mission Statement
- Market / Opportunity Assessment
- Business Case
- Feasibility Study
- Cost / Benefit Analysis
- Project Charter
- Project Management Plan-Schedule
- Requirements Specifications
- Software Configuration Management Plan
- Software Quality Assurance Plan
- High-Level Architecture
- Detailed Design Documents
- Validation Plan
- Unit / Integration Test Checklists
- Unit / Integration Test Summary Report
- System Test Plan
- System Test Scripts
- System Test Summary
- User Acceptance Test Plan
- User Acceptance Test Scripts
- User Acceptance Test Summary
- Traceability Matrix
- Validation Summary Report
- Change Request
- Training Plan
- Installation Guide
- User Guides
- Operations Guide
- System Administrators Guide
- Production Turnover



Initial Project Checklist
Project Name
Version

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- Product Retirement Plan
 - Project Signatures Log.

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