Project Initiation Checklist

Objective: To provide a detailed listing of tasks that will help you lay a solid foundation for the overall project effort. Several Initiation tasks are strongly recommended so that the project can kick off on a strong, solid foundation and the project team can be successful in delivering on the objectives.

The checklist has the following columns:
o Status – Indicator of the Initiation task status:

- o Checkmark (✔) – Indicates completion
- o WIP (WIP) – Indicates "Work in Progress"
- o Blank – Indicates not yet started

o Task – Action that must take place as part of the Project Initiation.

- o Any tools or templates mentioned in the checklist can be found in the Project Initiation Kit.

o Owner – The responsible Project Team member(s).

Status	Task	Owner
	Identify the Project Sponsor for the project.	Project Lead
	Schedule a meeting with the Project Sponsor to review the project details.	Project Lead
	Using the Project Sponsor survey from the Project Initiation Kit, review the details of the project with the Project Sponsor.	Project Lead and Project Sponsor
	Provide a copy of the Project Roles and Responsibilities to the Project Sponsor.	Project Lead
	Complete the Project Charter based on discussion with the Project Sponsor.	Project Lead
	Send a copy of the completed Project Charter to the Project Sponsor for approval.	Project Lead
	If the Project Sponsor has not provided the names of Project Team members, follow up with the appropriate person to identify Project Team members.	Project Lead and Project Sponsor
	Approval of the Project Charter as required.	Project Sponsor
	Upon approval of the Project Charter, schedule a Project Kick-Off meeting with the Project Team.	Project Lead
	Using the Kick-Off meeting agenda template, solidify topics for the Kick-Off meeting and identify the required meeting materials.	Project Lead
	Distribute the agenda and the meeting materials prior to the meeting so that the Project Team can prepare for the meeting.	Project Lead

	Bring additional copies of the meeting materials to the meeting in the event that someone needs a copy.	Project Lead
	Arrive to the conference or virtual room early to prevent rushing and arrange to have a tool available for taking meeting notes, such as a white board, flip chart paper, or an online notes application.	Project Lead
	Begin the meeting on time.	Project Lead
	Work through the agenda, beginning with an introduction of yourself as the Project Lead.	Project Lead
	Engage and ensure interactivity among the Project Team members, being sure to emphasize the value of their contributions to the overall project process.	Project Team
	Review risks with the team, being sure to ask the question: "Based on your experience and role with the project, what risks do you feel we should be aware of for a project like this?"	Project Team
	Solicit information from the Project Team members about the organization impacts, being sure to ask the question: "Based on your experience, who might be affected by this project effort?"	Project Team
	Determination of the collaboration tools will be used by the Project Team to help communicate with each other and the Project Lead.	Project Team
	Other discussion topics may include – work schedules, coverage for vacations, working remotely and status reporting needs.	Project Team
	Wrap up the meeting by reviewing any of the notes or action items that were identified during the discussion.	Project Lead
	Adjourn the meeting on time.	Project Lead
	Follow up the meeting with the notes that were captured and any of the action items that were identified in the meeting with the Owners.	Project Lead
	Distribute the notes to the Project Team. Always ask for feedback just in case any part of the discussion was inadvertently missed or misunderstood.	Project Lead
	Set up follow up dates in your calendar for any of the action items that were identified during the Kick-Off meeting with the team. Follow up.	Project Lead
Congratulations – you just got through your Kick-Off meeting! **Now is the time to start Planning your Project!**		