**Initiation & Planning Checklist**

| Item | Completed |
| --- | --- |
| **Prepare Communication Management Strategy** |  |
| Identified stakeholders and consulted them for their information needs? |  |
| Clarified communication messages? |  |
| Determined desired outcomes from successful communications? |  |
| Defined the Communication Management Strategy? |  |
| **Customise Configuration Management Strategy** |  |
| Reviewed the standard PMF Configuration Management Strategy for suitability? |  |
| Customised the standard PMF Configuration Management Strategy if necessary? |  |
| Created the Configuration Item Register? |  |
| **Complete Project Initiation Documentation (PID)** |  |
| Collated all the required information into the PID? |  |
| **Refine Project Plan** |  |
| Reviewed the Project Brief and kept the Project Plan in line with it?  Reviewed any relevant laws, regulations and standards to ensure accounted for in the Project Plan? |  |
| Reviewed the Risk and Issue Register to ensure accounted for in the Project Plan? Added any new risks and issues identified when creating the plan? |  |
| Tailored the tool to the project? e.g. large, complex projects needs to be done in Microsoft Project; midsized to small projects can use the Excel template; small, simple projects may be a product checklist in the PID |  |
| Consulted widely regarding identifying the products of the project and estimating the required effort, including those performing the work and reviewing past similar projects? |  |
| If a Communication Management Strategy has been done, are the tasks from it included in the plan? |  |
| Copied the project management templates into the project directory and created templates for the project products? |  |
| Confirmed commitment of resource availability, their acceptance of the role and their commitment to carry them out? (Sign off included in PID template.) |  |
| **Customise Risk Management Strategy** |  |
| Reviewed the standard PMF Risk Management Strategy for suitability? |  |
| Customised the standard PMF Risk Management Strategy if necessary? |  |
| Created the Risk and Issue Register? |  |
| Transferred any risks and issues from the Daily Log to the Risk and Issue Register? |  |

NOTE: To check the boxes on the side; right click the box and scroll down to “Properties”. Once clicked a window will pop-up, find “Default Value” and click the “Checked” option.