# Project Startup checklist

## Preparing with the project manager: objectives, results and the intake

Facilitating a Project Startup or another project meeting requires good preparation. Plan an intake with the project manager, and possibly with the sponsor, well in advance, so that you get a good picture of the purpose and nature of the meeting. This checklist helps you not to forget anything.

### PURPOSE OF THE MEETING

First discuss what they want to achieve: which objectives have priority and what is feasible? Possible objectives:

- Support for and understanding of the project.
- Clarity about the assignment and the scope demarcation.
- Getting to know each other and trusting each other.
- A shared approach.
- Cooperation and shared responsibility.
- A quick start or acceleration of the project.
- Insight into risks and possible measures.
- A shared experience and common insights among all participants and the sponsor.
- Working agreements for the collaboration and the first phase.

Depending on the phase, specific objectives may get more attention: specifying the project results and the work needed for them, agreeing on the relationship with users and other stakeholders, making a schedule and capacity estimate, team building, exploring the environment and the force field, or arranging the budget and the cost estimate.

**PLEASE NOTE**

If it is clear from the start that the main focus is getting the assignment clear, give the meeting a different name, for example assignment workshop. That way you prevent people from thinking that a Project Startup is only about the assignment.

### POSSIBLE RESULTS

- A project definition with broad support and a clear scope demarcation.
- A worked-out activity plan for the phase concerned.
- Agreements on tasks, authorities and roles.
- A list of agreements, each with a deadline and a person responsible.
- Agreements on working together, dealing with differences of opinion and conflicts, and decision making about them.
- A force field analysis with an action plan.

A risk analysis can also be part of the Project Startup, but we recommend a separate meeting, preferably a week or two later. By then the participants have been able to digest the results and the plan, and are ready to face the risks.

## CHECKLIST FOR THE INTAKE

### THE GROUP

- [ ] Who is needed in which role at the Project Startup?
- [ ] What is the group's level of knowledge?
- [ ] Per participant: role and expected participation, points of attention.
- [ ] To what extent do the participants know each other?
- [ ] What does this group need?

### PROJECT CONTENT

- [ ] How did the project come about?
- [ ] What are the intended objectives of the project?
- [ ] Which phase is the project in?
- [ ] Who is involved, and in which role?
- [ ] Which decisions have been made?
- [ ] Which documents are available? Which ones are good to send to the participants in advance?
- [ ] Is there visual material about the project to decorate the room or to show something of the project?

### SPONSOR

- [ ] How does the sponsor feel about it? How committed is he or she?
- [ ] What type of sponsor is he or she?
- [ ] What does the sponsor personally find important?

### THE PROJECT MANAGER

- [ ] How do you feel about it?
- [ ] What type are you, what are possible pitfalls?
- [ ] Which role do you want to take? How can I help with that?

### EXPECTATIONS OF THE FACILITATOR

- [ ] Your approach.
- [ ] What type are you, what are possible pitfalls?
- [ ] What do you expect of me as facilitator?

### YOUR OWN ASSESSMENT

- [ ] When do you, as facilitator, say yes to the assignment?
- [ ] What do you need to be able to do your assignment well?

### ROOM

- [ ] Location: movable furniture, walls you can stick things on, light, space.
- [ ] Logistics: start times, breaks, coffee, lunch, drinks.
- [ ] Flip chart paper, sticky notes, markers, sticky tape, masking tape.
- [ ] Project information, such as maps, photos and scale models, to display in the room for inspiration.

### INFORMATION

- [ ] A list of participants, with their job title and possibly their intended role in the project.

- [ ] Who makes the programme (usually the facilitator), and when? Who sends the invitation (usually the project manager)?
- [ ] Make sure you get a copy of the invitation, so that you know how the participants have been informed.
- [ ] Who takes notes, photos and/or minutes (not the facilitator)?

## ROUNDING OFF

At the end of the intake, check your first picture with the people you spoke to: the purpose of the Project Startup, the outline agenda and the intended results (what will be finished at the end?). On that basis, make an extensive and workable meeting design for yourself. It gives you something to hold on to, but you can also let go of it when the situation calls for it.

The most important outcome of a Project Startup is, of course, that the project comes alive, and that the participants know all the ins and outs and want to go for it.

## NOTES