

***Checklist instructions: All text in italics is instructional and will help you to complete the checklist. It should be removed from your document.***

*The following outlines the key activities that should be done and questions that should be answered in the Create phase of a project. It should be reviewed before beginning the Create phase and then periodically after that to remind you of what still needs to be done. Many project managers find it useful to have a printed copy of the checklist at their desk for easy reference.*

*Space is included at the bottom of the list to include any additional activities you may need to do during this phase.*

## Create Phase Checklist

Activity / Question	Tool/Template	Complete?
Has your project team researched the need that your products or services are trying to address?		
Has your project team documented the specific needs of each product and service as a list of requirements?		
Have these requirements been reviewed to ensure that they will meet the goals and deliver the outcomes expected for the project, including the scope as approved by the funders?		
As part of the requirements, have you identified how quality will be measured?		
If applicable, have the requirements been reviewed by the Advisory Committee?		
Have the requirements been approved by the Project Sponsor?		
If applicable, have the requirements been approved by the Steering Committee?		
Has your project team documented the design of each product and service (e.g., an outline for a curriculum or a mock-up of an		

Activity / Question	Tool/Template	Complete?
online training course)?		
Have these design specifications been reviewed to ensure that they will meet the approved requirements?		
Have the specifications been reviewed to ensure that they will meet the goals and deliver the outcomes expected for the project, including the scope as approved by the funders?		
If applicable, have the specifications been reviewed by the Advisory Committee?		
Have the specifications been approved by the Project Sponsor?		
If applicable, have the specifications been approved by the Steering Committee?		
Has the project team created a plan for reviewing the products or services after they are created?	Review Plan	
Is the plan realistic? Will it fit with the project's schedule and budget?	Review Plan	
Does your review plan indicate how you plan to address any feedback received from the review?	Review Plan	
Does your review plan indicate how you will assess the quality of the products and services?	Review Plan	
Have you developed (or revised) a plan for how each product or service will be delivered to the intended users after it is completed?		
Does your plan include activities for helping the intended users to make use of the products or services (i.e., change management) and ensuring that the products or services will continue to be available well after the project ends (i.e.,		

Activity / Question	Tool/Template	Complete?
sustainability)?		
If applicable, does your plan indicate how the products or services will be piloted (and revised based on feedback from the pilot)?		
Have you shared this plan with the project team and revised the plan based on their feedback?		
Have you reviewed the work plan to ensure that you are still on schedule and have enough hours to create the products or services as designed?	Schedule	
If you do not have enough hours to create the products or services as designed, have you made the necessary changes?	Schedule Change Request	
Have you reviewed the budget to ensure that you still have enough funding left to create the products or services as designed?	Budget	
If you do not have enough funding to create the products or services as designed, have you made the necessary changes?	Budget Change Request	
Have you ensured that your project team understands the plan for creating the products or services, including the amount of effort each should take, the order in which they should be created and that they need to follow the design specifications?		
Has each product or service been created?		
Have any changes that have been required while creating the products or services been addressed appropriately (i.e., adjusting the schedule/budget or doing a change request)?	Schedule Budget Change Request	

Activity / Question	Tool/Template	Complete?
Has each product and service been reviewed according to the review plan you created earlier in this phase?	Review Plan	
Have you gathered the feedback from the review process and discussed it with your project team?	Review Plan	
Have you identified a plan for addressing each suggestion that was made (e.g., ignore, address in this project or address in a future project)?	Review Plan	
Have you determined the impact that making any changes to the products or services will have on the remaining schedule and budget and made other adjustments as needed?	Schedule Budget Change Request	
Are all of the products and services that need to be created for this project created, reviewed and ready to be delivered?		