

Project Quality Review Form

Contact (See key below)	Risk Factor	Y E S	N O	SCORE 1=Low 5=High	COMMENTS
Project Initiation and Planning					
PM	1. Project Sponsor identified and named?				
PM	2. Project opened on Project Repository and communicated to project team?				
PM	3. Project Chartered (using Project Charter or email communication) and resultant document placed in project repository?				
PM	4. All Meetings (client and team) are documented and Meeting Reports added to Project Repository?				
PM	5. Project contact list created for all parties?				
PM	6. Project distribution list created for all parties?				
PM	7. Project Requirements Document captures and clearly documents Client Needs and Requirements?				
PM	8. Project Requirements Document captures and clearly documents Client's Goals and Objectives?				
PM	9. Project Requirements Document captures Client's project timeframe?				
PM	10. Project Management Plan clearly documents Project Goal (Does the project team have a clear understanding of the client's goals and expectations for the project in both economic and non-economic terms?)				
PM	11. Project Management Plan clearly documents Project Scope (Is there a documented statement of work that was produced by the client and has the Project Management Plan been compared against it?)				
PM	12. Project Management Plan clearly documents Project Objectives / Deliverables (Does the project team understand the complexity and measurability of client requirements and are delivery quality targets appropriate?)				
PM	13. Project Management Plan clearly documents Project Acceptance Criteria.				
PM	14. Project Management Plan clearly documents Project Assumptions				

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PM	15. Project Management Plan clearly documents appropriate Project Risks and any mitigation plans.							
PM	16. Project Management Plan clearly documents Project Resource Requirements (The Company and Client)							
PM	17. Project Management Plan clearly documents Planned Project Duration and Completion Date along with major milestones							
PM	18. Project Management Plan clearly documents Change Control Management Plan and provides Change Control form (Project Change Control is communicated to the client in the Project Management Plan and verbally)							
PM	19. Project Management Plan clearly documents Issues Management and Escalation Plan							
PM	20. Project Management Plan clearly documents Communications Management Plan							
PM	21. Written agreements and changes reviewed by client leaders and The Company counsel							
PM	22. The project team discusses key aspects of the Project Management Plan with the client and the client understands those key aspects							
PM	23. Project Schedule created and distributed to client and project team?							
PM, PT	24. Project Team members took part in Project Schedule creation?							
PM	25. There is a level of confidence in project timeline, hours and budget estimates							
PM	26. Project Manager understand the resource requirements for the project as measured by the number of team members and estimated hours							
PM	27. Project Schedule allows appropriate time for coaching, mentoring, and training of project team members.							
PM	28. Does the Project Schedule appropriately include the impact of client/third-party involvement to the estimates?							

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Project Implementation					
PM	1. A Project Kick-Off meeting was held with project team members including client, and any third-party sub-contractors to review project objectives, schedule, assumptions, roles and responsibilities, communications plan, change control, issues management, and rules of conduct during project delivery. Kick-off Meeting report was posted to Project Repository.				
PM	2. Is the Project Manager conducting weekly meeting to provide team members with their daily/weekly tasks?				
PM	3. Is the Project Manager collecting feedback/input from team members on task completion?				
PM	4. Project Status Meeting agenda is distributed to all project team members prior to the Status Meeting and posted in Project Repository.				
PM	5. Project Status Meeting minutes are distributed to all project team members after the Project Status Meeting and are posted in Project Repository.				
PM	6. The Project Manager conducts weekly status meeting with project team and client to discuss at minimum project issues and project schedule?				
PM	7. Project schedule being updated on regular basis with task completion.				
PM	8. Does the project manager obtain a level of consensus among client, The Company, and third-party personnel regarding project task status				
PM	9. Updated Project Schedule distributed to project team and posted in Project Repository.				
PM	10. Does the project manager ensure that project milestones are understood and are being achieved				
PM	11. Any issue documented on the Issues Matrix, assigned to an individual, and the status is tracked to resolution.				
PM	12. Project Issues Matrix is distributed to all project team members after the Project Status Meeting and is posted in Project Repository.				

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PM	13. Does The Company project team appear to be meeting or exceeding the client's delivery quality expectations while staying within project scope and budget							
PM	14. Does the project team anticipate Project Schedule deviations; identifying the causes and taking appropriate actions							
PM	15. Is the Change Control process, outlined in the Project Management Plan, in place to capture, log, and manage any requests for change to project scope, schedule, resource, cost, or quality?							
PM	16. All Change Control forms are filled in appropriately, copied to all project team members, and is posted in Project Repository.							
PM	17. If project changes are accepted which will alter the project pricing, are billing changes handled?							
PM	18. The project manager has instituted tracking methods for measuring actual results (e.g., hours, expenses, revenue, realization and profit) against budgeted amounts in the detailed project schedule, planned measures are being compared to actuals.							
PM	19. The project manager distributes the results from these tracking methods on a regular basis to management along with posting all reports in the Project Repository.							
PM	20. Are The Company's best practices for project management being leveraged?							
PM	21. Project risk assessments been prepared (should be done during the creation of the Project Management Plan) and the approach to managing project risk to mitigate or eliminate risk exposure is in evidence and documented.							
PM	22. All Risk Mitigation plans are posted in the Project Repository.							
PT, PM	23. The project team is using the appropriate tools techniques, and technology							
PM	24. Is there an appropriate degree of technical soundness of project deliverables							

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PM	25. The level of Quality Advisor involvement is considered adequate. Action plans have been developed and action items are being addressed				
PM	26. Appropriate project output reviews are being completed, and follow-up actions are being taken as a result of those reviews				
PM, C	27. The client is participating in key decisions (e.g., deliverable definition, and approval of outputs). Client personnel are providing information and approvals of outputs and definitions on a timely basis				
PM	28. Project management is involved in the timeliness of billing and adequacy of tracking methods installed to ensure collection on the agreed upon payment schedule, collections are up to date				
PM	29. Project management has the ability to diagnose causes of financial deviation and provide timely corrective action				
PM	30. The Project Sponsor and Project Manager establishes revenue reserves in a timely manner. Any unplanned write-offs are immediately communicated to company leaders				
PM	31. Project management encourages team members to contribute ideas for improving service quality and/or project efficiency and ensures that improvement ideas are being implemented				
PM	32. Project Team members create daily logs, which are combined and presented to client and company management on a weekly basis in a Status Report. All reports are posted in Project Repository.				
Project Closeout					
PM	1. Project Management Plan completed for project?				
PM	2. Project Schedule completed for project?				
PM	3. Project Closeout form signed by client?				
PM	4. Project Closeout review held with project team and client? a. Lessons Learned documented b. Best Practices documented c. Ideas for improvement documented				

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PM	5. All project documentation delivered to client and archived for future reference				
PM	6. Project Manager writes appraisals for each project team member.				
People					
PM, PT	1. There is an appropriate project team organizational structure				
PM	2. There is an appropriate degree to which team leaders are prepared for their project management roles and responsibilities				
PM, PT	3. Roles and responsibilities for all individuals (company, client, third party) have been clearly articulated and agreed-upon				
PM	4. Extent and effort of third-party involvement is understood by the project manager				
PM, C	5. There is adequate, active company management involvement with the client				
PM, PT	6. The project team understands the scope of and approach to the project as specified in the written agreement including any changes				
PM	7. There is appropriate availability of client, company, and/or third-party personnel required to fulfill detailed project team skill requirements utilizing the company's staffing process;				
PM, PT	8. There is an appropriate degree of alignment between work plan responsibilities and team member competencies/career development goals				
PM, PT	9. There are effective team-building and skill building sessions				
PM, PT	10. The project team is utilized for concentrated periods of time				
PM, PT	11. The project team is deployed as specified in the project schedule				
PM, PT	12. Project team morale is positive and their performance is effective				
PM, PT	13. Coaching, counseling, project evaluations, feedback, recognition, and reward are provided to the project team				

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PM, PT	14. The project management and team members support appropriate work-life balance initiatives				
PM	15. There is an appropriate degree of client staff involvement in and resource support for the project work effort is in accordance with the plan				
PM	16. There is an appropriate degree of access to client personnel who are anticipated to be actively involved in the project and/or who can contribute to project success				
PM, PT	17. The project team is having frequent and meaningful contact with client personnel, particularly with client executives				
Project Collateral					
PM, PT	1. There is an availability of effective support capabilities (e.g., automated tools, hardware and software, work space, etc.)				
PM, PT, C	2. Knowledge is transferred between The Company and client team members				
PM, PT, C	3. There is adequate documentation for data collected, reference material sourced, observations made, analyses and procedures performed, opinions derived, conclusions reached, project deliverables produced, and results achieved				
PM, PT, C	4. There is an appropriate degree to which project documentation is organized, complete, and free of extraneous items				
Client					
C, PM	1. Breadth of client sponsorship is adequate to support a successful organizational change				
C, PM	2. There is an appropriate degree of availability of client steering committee/advisory group to ensure client consensus				
C, PM	3. The client organization and management appear sufficiently stable and harmonious in their internal relationships.				
C, PM	4. There is a strong existing client/The Company working relationship				
C, PM	5. There are adequacy guidelines for working in the client environment (e.g., work hours, facility access, client internal policies and procedures);				

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C, PM	6. The client perceives the project as a good investment. The client continues to understand the value to be derived from the project				
C, PM	7. There is a appropriate degree of client involvement in refining the project approach				
C, PM	8. The client organization understands change control procedures and the potential impact on project budgets and deadlines				
C, PM	9. The client is satisfied with the project team, project progress, project outputs, and the impact of project solutions on client environment, organization, and technology				
C, PM	10. There is an appropriate degree of client implementation of the project deliverables and acceptance of the project results				
C, PM	11. The client has developed an <i>infrastructure</i> that supports: the fast formation of cross-functional teams; efficient project planning and working as a team; solving problems and making decisions effectively; and producing complex work products				
C, PM	12. The client, frequently and efficiently, uses matrix management relationships and works cross-functionally				
C, PM	13. The client's two-way communication processes and communication habits are robust and the leaders of the organization easily mobilize the organization around significant change, and have demonstrated it in the past				
C, PM	14. There is at least one executive who is clearly accountable for the success of the project and the project is the most important responsibility on their agenda				
C, PM	15. The business case for the project is linked to the financial performance of the organization, and linked to the compensation of senior executives				
C, PM	16. Executive leverage is being effectively applied to keep the project moving quickly and efficiently				
C, PM	17. There is a plan, and there are allocated resources, for using communication as a tool for mobilizing the organization to embrace the change				

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Overall (520 possible)					

Other Comments	
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