Project Onboarding Checklist

Once a proposal is accepted use this list to make sure your team is managing all the tasks that are easily forgotten. Make this a standard operating procedure for all projects.

Pre-Onboarding Preparation (Internal)

- [ ] Confirm project scope, budget, and schedule from the contract
- [ ] Assign a project manager and key team members
- [ ] Set up project folders and files in your server system
- [ ] Schedule an internal kickoff meeting to review scope, deliverables, and deadlines
- [ ] Identify resource needs (staffing, consultants, materials)
- [ ] Review legal, compliance, and insurance requirements in contract

Contracts, Documentation, and Approvals

- [ ] Ensure signed contracts and agreements are in place
    - [ ] Contract between you and your client
    - [ ] Contracts between all relevant parties (consultants, stakeholders, contractors, etc.)
    - [ ] Make sure everyone has a copy of relevant contracts
    - [ ] Put copies in your firm management system and server folder structure
- [ ] Gather and review existing project documentation (drawings, site surveys, reports)
- [ ] Confirm permitting, zoning, and regulatory compliance requirements
- [ ] Secure NDAs and confidentiality agreements if applicable

Project Planning & Scheduling (Continued)

- [ ] Set up the project in firm-wide management software (BQE CORE, ERP, CRM, etc.)
- [ ] Develop a detailed project schedule with phases, tasks, and deadlines
- [ ] Define key performance indicators (KPIs) for tracking project success
- [ ] Establish a risk management plan
- [ ] Define quality control measures and peer review process
- [ ] Develop your resource plan for project staffing
- [ ] Assign tasks and responsibilities within the team

Technology & Software Setup

- [ ] Set up project collaboration tools (BIM, PM software, shared cloud storage, communication platform)
- [ ] Ensure team has access to necessary software, templates, and guidelines
- [ ] Configure reporting and tracking tools for real-time project monitoring
- [ ] Give proper permissions and access to outside consultants and contractors

Budget & Financial Tracking

- [ ] Set up project budget tracking in financial management software
- [ ] Confirm billing structure (fixed fee, hourly, milestone payments)
- [ ] Create a billing and invoicing schedule aligned with project phases, percent complete, or as fixed monthly payments
- [ ] Set up cost control monitors to measure progress and prevent budget overruns
- [ ] Establish financial check-ins and reporting frequency and schedule

Client Kickoff & Communication

- [ ] Send the clients a welcome package (if you don't have one, design one for this project and future use.)
- [ ] Schedule the initial client kickoff meeting
- [ ] Develop the agenda for the kickoff meeting, including:
    - [ ] Review expectations, goals, and decision-making process
    - [ ] Clarify roles and responsibilities between client, firm, consultants, and stakeholders
    - [ ] Establish preferred communication methods and frequency
    - [ ] Share project timeline, deliverables, and key milestones
    - [ ] Discuss risk factors and project constraints
- [ ] Establish design review and approval process with the client
- [ ] Provide documentation to define the process required for design changes, scope adjustments, budget changes, and approvals
- [ ] Schedule regular progress check-ins and status updates