Project Management Checklist

A practical guide for small teams to plan, track, and execute projects efficiently.

Introduction

Whether you're launching a campaign, developing content, or managing a client deliverable, this checklist is designed to give you a streamlined approach to managing marketing projects with limited resources. Use it to ensure key steps aren’t overlooked, and your team stays aligned every step of the way.

This document is ideal for project leads, marketers, and freelancers who want to improve team coordination, avoid bottlenecks, and gain clarity across tasks. Each step includes practical tips to guide execution and avoid common pitfalls.

Project Management Checklist

- ☐ Define the project objective and goals

Clearly outline what the project is meant to achieve. Use SMART goals to ensure specificity and alignment with business outcomes.

- ☐ Identify project stakeholders and assign roles

List everyone involved and clarify responsibilities (e.g., who leads, who approves, who executes). Use a RACI model if needed.

- ☐ Set a clear project timeline with milestones

Break the project into phases and assign realistic deadlines for key deliverables and review points.

- ☐ Break down the project into tasks and subtasks

Use a task management tool (e.g., ClickUp, Trello, Asana) to visualize and organize every piece of work involved.

- ☐ Assign responsibilities and due dates for each task

Make ownership clear so nothing falls through the cracks. Share this plan with everyone involved.

- ☐ Determine communication tools and meeting frequency

Decide where discussions will happen (Slack, email, Notion) and how often the team should meet to sync.

- ☐ Create a shared project folder (e.g., Google Drive, Notion, Asana)

Centralize all relevant files, documents, assets, and links in one easily accessible place.

- ☐ Draft and approve content outlines or creative briefs

Before executing, document the vision, target audience, channels, and messaging for each piece.

- ☐ Review and approve assets before launch (design, copy, etc.)

Build in time for QA checks. Get approval from stakeholders before pushing anything live.

- ☐ Schedule content (social media, blog, email)

Use scheduling tools (like Buffer, Later, or HubSpot) to automate publishing and reduce last-minute rushes.

- ☐ Monitor task progress and address blockers in team check-ins

Track activity regularly. Adjust timelines or reassign tasks to avoid delays.

- ☐ Conduct post-launch review (performance, feedback, improvements)

Hold a short retrospective to gather insights and identify what worked and what needs improvement.

- ☐ Document lessons learned and optimize for future workflows

Create a short summary or checklist for future projects based on what your team learned.

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