Managing Project Expectations Checklist

1. Initial face-to-face meeting with client to discuss their needs and timeline and establish realistic expectations by educating them on general process.

2. Assign a lead and talk with our team about roles and responsibilities and capacity to meet schedule.

3. Set a realistic budget to cover contingencies.

4. Introduce team to client with clear explanation of their roles and responsibilities.

5. Review written agreement with client to confirm scope, schedule and budget.

6. Check in with team weekly on progress toward completion, foreseeable issues.

7. Lead to provide frequent progress updates to client.

8. Notify client immediately of issues and provide alternative solutions.

9. Check in at least monthly with client on satisfaction.

10. Finish strong and tie up any loose ends.