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Description automatically generated](https://www.smartsheet.com/try-it?trp=12401&utm_source=template-word&utm_medium=content&utm_campaign=SEO)Resource Plan Checklist**

*Instructions: Review each item on the checklist before moving forward with your project to ensure you’ve covered the major components of resource planning.*

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| **Project Foundations** | |
|  | Define project scope, objectives, and deliverables |
|  | Map project phases onto a timeline |
| **People and Roles** | |
|  | Identify key roles (PM, designers, developers, QA, etc.) |
|  | Check internal team availability, capacity, and skills coverage |
|  | Plan for external support (consultants, contractors, vendors) if needed |
| **Scheduling and Workload** | |
|  | Create a resource calendar or schedule for assignments |
|  | Balance workloads to avoid underutilization or burnout |
|  | Account for vacations, holidays, and other conflicts |
|  | Include contingency time for unexpected issues |
| **Tools and Materials** | |
|  | List software licenses or subscriptions needed |
|  | Schedule equipment, facilities, or special tools (e.g., hardware, lab time) |
|  | Confirm availability of shared resources (e.g., meeting rooms, test environments) |
| **Budget and Costs** | |
|  | Estimate labor costs for internal staff and external resources |
|  | Estimate non-labor costs (software, hardware, travel, training, etc.) |
|  | Add contingency funds for unexpected expenses |
| **Tracking and Alignment** | |
|  | Define how you’ll monitor planned vs. actual usage (costs, time, effort) |
|  | Review the plan with team members, stakeholders, and resource managers |

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