

Project Management Check List

Today's Date

Intaker's Initials

PROJECT OVERVIEW

INTRODUCTION / PURPOSE OF THIS METHOD | If you want better business results faster, then use this method. This method has been distilled from dozens of years of input on what works, by hundreds of our founder-lead business clients, who take charge of business outcomes. The purpose of this method is to map out on paper what you are choosing to spend your hard earned capital on--before you spend it. Remembering every action in business has a obvious and hidden impact on productivity and profit. As initiator or leader, who is choosing to take action, it is your job to make sure you know as much about the hidden impact as you can. Take charge of results and your future by using this method.

PROJECT NAME

DEPARTMENT : ADMIN FINANCIAL MANAGEMENT MARKETING--SALES
 ORG DEVELOPMENT PERSONNEL PLANT/TECHNOLOGY PRODUCTION RESOURCES

ROI | PAYOFF MAKE \$, SAVES OR TIME, IMPROVE WHAT QUALITY?

Yes, proceed No, do not proceed, Yes, at a later date:

FORMS TO USE TO COMPLETE THIS MISSION: Goal Setting / Action Plan. MAP, DWMQA Check List, your schedule

PHASES TO MONITOR

1

Ready?

Phase 1 | Open | Decision Task Project Meeting Work Session Dialog

PURPOSE OF THIS PHASE is to determine what / if this action will deliver the desired return on investment

- Scope the project by completing a Goal Setting/Action Plan on it before proceeding

2

Set?

Phase 2 | Plan | Pull forms Prepare Copy To All Finalize Approvals

PURPOSE OF THIS PHASE is to collect facts and refine project scope by incorporating the input of everyone involved, potentially involved or impacted, before proceeding

- Set up a working file and MAP and use those document as your controls / management agenda
- Gather all relevant documents and copy to the file
- Prepare all questions needing to be answered by participants and copy to the file
- Seek out and gain agreement on goals, roles and expectations of all involved before proceeding

3

Go!

Phase 3 | Execute | Meet Do The Work | Communicate | Update Weekly

PURPOSE OF THIS PHASE is to lead team by planning ahead and remaining prepared

- Secure and allocate necessary resources; money, people, equipment. Fund the project
- Meet with each team member involved via email, phone or face to face, whichever is best for them
- Communicate with all stakeholders on progress and expectations daily or weekly
- Anticipate challenges and actively seek to resolve issues or overcome obstacles by going directly to the initiating party

Phase 4 | Direct & Redirect | Lead Communication Redirect Reset goal

PURPOSE OF THIS PHASE is to monitor progress and redirect actions of team using documents

- Correct course and document by initiating/remaining in regular communication with teammates using your DWMQA schedule and calendar
- Collect and evaluate changes in the project requested by all involved using Coaching model
- Reprioritize and reschedule as needed by collecting inputs of those effected
- Shift resources as needed and maintain Meeting Note documentation--file
- Reduce, refine or simplify the scope based on gathered feedback
- Return to the planning stage to adjust project goals, steps, resources, timeline, budgets
- Gain agreement on revised scope and project needs--on going, weekly with each teammate

Phase 5 | Complete | Finalize | Celebrate!

PURPOSE OF THIS PHASE is to officially recognize success and identify what works for replicating in similar future projects

Prepare final reports; proof, edit and finalize documentation

- All stakeholders sign off as completed agreeing through meetings and documentation
- Survey all participants for project management education and customer satisfaction
- Review projects process and accomplishments with all involved
- Present final report date: _____
- Celebrate success as a team date: _____
- File final report date: _____
- Retire documentation date: _____