

# Project Management Router

\_\_\_\_\_  
Today's Date

\_\_\_\_\_  
Start Date from Contract

\_\_\_\_\_  
Estimated Completion Date

\_\_\_\_\_  
Actual Completion Date

\_\_\_\_\_  
Project Name, Number or Address

\_\_\_\_\_  
Project Leader/Manager

\_\_\_\_\_  
Project Participants

\_\_\_\_\_  
Project Participants

\_\_\_\_\_  
Project Participants

\_\_\_\_\_  
Project Participants

\_\_\_\_\_  
Project Participants

\_\_\_\_\_  
Project Participants

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**Phase 1 | Open The Project** | The purpose of this phase is to determine what / if this action will deliver the desired return on Investment

- Decision  Task  Project  Meeting  Work Session  Dialog
- Scope the project. Completing a written action planner before proceeding. Decide who will help.

**Phase 2 | Plan The Project** | The 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

- Pull forms  Prepare  Copy To All  Finalize Approvals
- 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

**Phase 3 | Execute The Project** | The purpose of this phase is to lead team by planning ahead and remaining prepared

- Meet  Do The Work |  Communicate |  Update Daily | Weekly | Monthly | Quarterly
- 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 The Project** | The purpose of this phase is to monitor progress and redirect actions of team using documents

- Lead Communication  Redirect  Reset goal
- 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 The Project** | Finalize | Celebrate! | The 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: \_\_\_\_\_