Project Punch List (8 Steps)

Project management is a skill. Below is a template to help your project be more successful. This punch list offers a discipline and a written record.

1. **Identify the problem - Define the issue you have chosen. What are the clear goals, objectives, and benefits. Make it S.M.A.R.T.** (specific, measurable, agreed upon, realistic, and time based) (Write it in the space below)

   a. **Is it?** (Write down your point of view about each one. To be a candidate for a project most of these should be present.)

   ☐ **Chronic**

   ☐ **Visible**

   ☐ **Solvable**

   ☐ **Measurable**

   ☐ **Significant**

2. **Identify resources** (Write down resources to work with / people and things)

Identify your team (Include people who are affected, who have expertise, who are good at looking at and sorting information and/or numbers, etc.?)

a. **Define roles for team members.** (Lead, note taker, number cruncher, etc. Write it down)

b. **Operations** (how we operate day to day, write it down)
  - ☐ **Meeting plans?** (how often, how will you make decisions, other norms you need for your team.)

Stakeholders
a. **Who will be most impacted by this issue and the work we do?**

b. **Who has the resources?** (money, people, information, coordination of effort that we need to carry out our work)

c. **Who will be supportive and who will need convincing?**

3. **Brainstorm** ideas to solve the problem

4. **Prioritize your brainstorming** ideas

5. **Trial and Error:**

   Pick measures (what are we measuring and how, time, dollars, etc.)
   Benchmark / measure current reality (keep records)

   What are you going to test and what difference do you think it will make/save? (Quantify as best you can)

   Develop a plan of action and submit for comment and approval.

   Test It…gather data

6. **Evaluation and Refinement.**

7. **Implement** (Document what is made or saved. Adopt as a best practice)

8. **Celebrate!**