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!**