LEAD A PROJECT · START HERE

MISSION AND VISION

Every project needs a why and a picture of done before it needs a plan.

PROJECT

START DATE

PROJECT OWNER (ONE ACCOUNTABLE PERSON)

SPONSOR (WHO THE OWNER ANSWERS TO)

MISSION: WHY ARE WE DOING THIS?

The reason this project exists. If it disappeared, what would be lost?

e.g., So customers on the north side get the same service without a 40-minute drive.

VISION: WHAT DOES SUCCESS LOOK LIKE?

Describe the finished picture as if it's already done.

e.g., By March, the second location is open, fully staffed, and covering its own costs.

SUCCESS MEASURES

Two or three numbers that tell everyone you've arrived.

e.g., open by March 1 · 8 staff hired and trained · break even by month 4

	MEASURE	TARGET	BY WHEN
01			
02			
03			

HOW WE'LL WORK

Which of our values should guide decisions on this project?

LEAD A PROJECT · SCOPE

SCOPE AND TIMELINE

Saying what the project won't do is the cheapest protection against scope creep.

in scope

What this project will deliver

e.g., lease, build-out, hiring, opening week

out of scope

What it won't do

e.g., a new product line, a rebrand

IF SOMEONE WANTS TO CHANGE THE SCOPE, WHO APPROVES IT, AND HOW?

MILESTONES

the checkpoints between today and done

	MILESTONE	TARGET DATE	OWNER	STATUS
01				
02				
03				
04				
05				
06				
07				

FIXED DATES OR CONSTRAINTS WE HAVE TO PLAN AROUND

LEAD A PROJECT · RESOURCES

CAPITAL AND PEOPLE

Name what this project costs in money and in people before you start spending either.

CAPITAL RESOURCES

TOTAL BUDGET	APPROVED BY	WHERE THE MONEY COMES FROM

	EXPENSE	ESTIMATED	ACTUAL	NOTES
01				
02				
03				
04				
05				

HUMAN RESOURCES

team members and contractors on this project

	PERSON	ROLE ON THE PROJECT	HOURS/WEEK	WHAT THEY NEED FROM US
01				
02				
03				
04				
05				
06				

GAPS: PEOPLE, SKILLS, OR TOOLS WE DON'T HAVE YET

LEAD A PROJECT · DECISIONS

DECISIONS AND DELEGATION

Decide who can make which decisions before the project starts, not in the middle of it.

empowerment

Providing the right **information**, **training**, **resources**, and **leadership** so that people can make the right decisions within the culture and policies of the organization.

1 do as directed	2 research, recommend	3 decide, inform first	4 act, report after	5 full ownership

Levels of authority. Pick one for every decision and task, and say it out loud.

DECISION RIGHTS who decides what

	DECISION	WHO DECIDES	LEVEL	WHO MUST BE TOLD
01				
02				
03				
04				
05				

DELEGATION OF TASKS

	TASK	DELEGATED TO	LEVEL	WHAT THEY NEED
01				
02				
03				
04				
05				

"What they need": the information, training, resources, or leadership that makes the level work. For bigger handoffs, use the Delegation Handoff Brief.

LEAD A PROJECT · COMMUNICATION

WHO NEEDS TO KNOW

Most project frustration isn't about the work. It's about someone finding out too late.

COMMUNICATION PLAN

who needs to know what, by when

e.g., owners, managers, the team, key customers, vendors

	WHO	WHAT THEY NEED TO KNOW	BY WHEN	HOW
01				
02				
03				
04				
05				

MEETING RHYTHM

for any project more than a week out

	MEETING	HOW OFTEN	WHO ATTENDS	PURPOSE
01				
02				
03				

A good starting rhythm: a weekly 30-minute team check-in, a review with the sponsor at each milestone, and a short update to everyone else once a month.

every check-in answers three questions

01 What did we finish?

02 What's next, and who owns it?

03 What's in the way?

To run each meeting well, use the Lead a Meeting tool.

WHERE THE WORK LIVES

pick one place for each, and tell the whole team

e.g., Asana, Trello, or a shared spreadsheet · Google Drive · Slack or Teams · a shared calendar

TASKS AND BACKLOG	FILES AND DOCUMENTS	TEAM COMMUNICATION	CALENDAR AND DEADLINES

The rule: if it's not in the system, it doesn't exist.

LEAD A PROJECT · THE WORK

BACKLOG AND RISKS

The backlog is every task the project needs. Start with the top ten and keep it current.

PROJECT BACKLOG

	TASK	OWNER	DUE	PRIORITY	STATUS
01					
02					
03					
04					
05					
06					
07					
08					
09					
10					

PRE-MORTEM plan for the top three risks

"It's the end of the project and it failed. What went wrong?" Ask the team, then list the three most likely answers.

	WHAT COULD GO WRONG	LIKELIHOOD	OUR PLAN
01			
02			
03			

LEAD A PROJECT · FINISH

CLOSE IT OUT

A project isn't done when the work stops. It's done when the team has learned from it and been thanked.

DID WE GET THERE?

compare with the success measures on page 1

	MEASURE	TARGET	ACTUAL
01			
02			
03			

DEBRIEF

WHAT WENT WELL THAT WE SHOULD REPEAT?

WHAT WOULD WE DO DIFFERENTLY?

WHAT DID WE LEARN ABOUT OUR TEAM?

WHAT SURPRISED US?

HANDOFF

work that continues after the project ends

WHO OWNS IT GOING FORWARD

WHAT TRANSFERS TO THEM

CELEBRATE

- [ ] We thanked the team, by name, for specific contributions.
- [ ] We shared the results with everyone on the communication plan.
- [ ] We saved the files and lessons where the next project lead can find them.