

# BKPM



## BARE KNUCKLED PROJECT MANAGEMENT

### POCKET GUIDE

FOR PROJECT MANAGERS

Release 2

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## **BKPM Pocket Guide for Project Managers – Release 2**

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## How to Use This Guide

If you are the greatest project manager of modern times, simply throw this guide in the trash; otherwise, put it next to your keyboard, in a convenient pocket, stain it with coffee rings or condensation from a cold drink, but keep it handy. This is your get out of jail free card; however, it isn't magic. It's a tool and you'll need to learn **how** and **when** to use it.

The single most difficult thing for you to learn is when you should reach for this guide. Believe it or not, you already know. You just don't know that you know and you need to become more attuned with your feelings. That's right, you're human, you have a powerful brain and a big part of your brain gives you your feelings. These are the single most valuable indicator that you need to do something different. Consider this, while managing a project, if you feel anything other than absolute control, it's time to figure out why. Feelings like anxiety, fear, concern, or perhaps worst of all, indifference, are BIG indicators and tell you that you need to be doing something other than what you are.

When you feel anything other than control, ask yourself, **"Why?"** You may know and simply need to slow down enough to realize it. Even more likely, especially at first, you'll ask yourself why and reach the conclusion, **"I have no clue."** As soon as that happens, grab this guide!

There are many useful tips in this guide including BKPM principles, Think's Rapid Control Process, project kickoff job aids and much more.

## Using BKPM Principles for New Options for Action

BKPM principles and techniques are designed to help you make the right decisions while managing a project. You can have the best process in the world, but you also need to be sensitive to project conditions and you need to make the right decisions in order to execute.

BKPM principles and techniques provide an alternate point of view from which you can evaluate your current state. Adopting this new point of view can unlock new options for action. Not all principles apply to every situation, so the challenge is in finding the right principle for your current situation; remember there may be several.

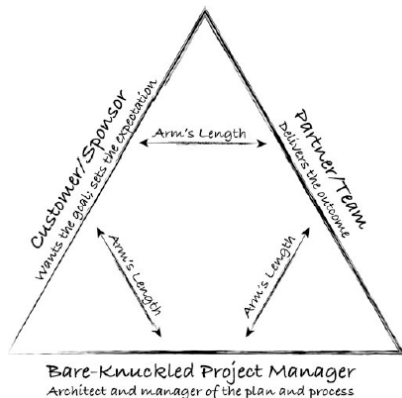
### Examples:

- You have a new project and you're trying to get your arms around it, but it just seems too amorphous and has too many unknowns. **Chunking** might help, so might **Enumeration without Fear**.
- You've identified a risk but don't have a perfect way to mitigate it. At best you have a pretty good idea how to react if it does happen. Better consider developing an **Access Portal**.
- No one agrees how to get going and everyone keeps suggesting more analysis to attempt to identify a solution. Don't get frustrated. **Forward Motion** is the principle you are look for and you may need to implement **Momentum over Analysis**.

## BKPM Principles and Techniques

Of all of the principles in this guide, the concept of managing project as if the BKPM is sitting at a three-sided table is one of the most fundamental. Almost everything else is designed to maintain this relationship between project owners and fulfillment teams.

No project manager, not even the most highly skilled, can do it alone. Executive leadership sets the tone and provides the support; project sponsors establish the goals; the solutions team partners to do the work; and the project manager runs the plan and process. Establishing clear goals, roles, and expectations for the different project players is a necessary precondition for the BKPM.



The following table provides a list of established BKPM principles and techniques, but it doesn't need to stop here. If you find something that works well for you, add your own to this list and use it to become a better BKPM.

BKPM Principle	Description
<b>Access (Escape) Portals</b>	A strategy the BKPM builds into the plan to allow bridging the gap with the customer when conflict and problems arise. Access portals include agreeing about areas of relative flexibility, agreeing about responses to foreseeable risks, agreeing about approaches to unforeseeable risks and issues, and agreeing about processes for conflict resolution.
<b>Anti-fragile</b>	This principle applies to many things but very often to project plans and risk mitigation strategies. It is a process by which you intentionally expose your intensions to outside stressors in order to see if they hold up under new pressure or scrutiny. Whenever you have plans that are solid and buttoned up, then make them Anti-fragile.
<b>Change Management</b>	A process by which changes are negotiated or accepted as fact, are documented, and are rolled into outcome modification, project planning, and risk management.

BKPM Principle	Description
<b>Chunking</b>	If any process step is too large to accurately track progress, individual responsibility, external variables that may impact it, or variables that it may introduce to other process steps, it must be broken down. Chunking is the process by which a BKPM continually breaks-down project components into actionable pieces, even if the action is to break it down further.
<b>Conflict Resolution</b>	A thoughtful process in which you first identify your goals in order establish a strategy for resolving the conflict. A BKPM doesn't have to fight every battle, but is unafraid and will move forward with purpose if a battle is warranted.
<b>Co-opt Risk</b>	What happens when the three-sided table breaks down and the project manager becomes aligned with one of the remaining two sides.
<b>Enumerate without Fear</b>	Create a punch list. Free yourself from worrying about priority, order, or importance and simply list everything that you can think of that needs to be dealt with. Any item, large or small, can be added to a punch list. Once the punch list is established, every item can be broken down and planned.

BKPM Principle	Description
<b>Executive Options</b>	Risk mitigation and project control that exceeds the general ability of a BKPM. These options empower executives to work within the triple constraint model to enable large investment/authority changes that provide BKPM with new options. Executive Options generally result in Access Portals once properly Snaked.
<b>Forced Clarification</b>	The process by which the BKPM ensures that the customer or sponsor defines the outcome, a necessary precondition to moving forward with the project.
<b>Forced Conflict</b>	A purposeful situation where the BKPM sets up a direct conflict to force a resolution to an imminent process incompatibility or risk.
<b>Forward Motion</b>	A BKPM is committed to moving forward constantly, even when goals aren't clear (which is most of time).
<b>Guard Rails</b>	This describes what we do to set up and pattern of execution that is pre-programmed. Example: The control phase of the RCP sets a weekly meeting and Agenda and commits to it through the course of a project. That series of committed executions, and others like it, we call Guard Rails.

BKPM Principle	Description
<b>G-R-E-A-T</b>	An acronym for team building, which works best when people are clear about goals, roles, expectations, attitudes and aptitudes, and time.
<b>Iterative Approach</b>	When the outcome isn't clear up front, the project may go through cycles and multiple prototypes to gain increasing clarity and understanding. May be part of an agile process.
<b>Land Mines</b>	Land minds are numerous individual actions put in place to force forward momentum or keep action within a particular vector. Usually, land minds result in a negative outcome if hit and, therefore provide negative reinforcement.
<b>Mistake Management</b>	A process that provides a framework and directives for dealing with mistakes before they spiral out of control. It must be addressed without fear of confrontation, but also with the understanding that mistakes are rarely intentional. Look for root causes and build checks and balances to minimize the likelihood of additional mistakes.

BKPM Principle	Description
<b>Momentum over Analysis</b>	A strategy used to make the project move forward regardless of unknowns. If mired down in analysis, build small achievable steps to force forward progress.
<b>Pre-Mortem</b>	During plan review and snaking, ask task owners to conduct a pre-mortem that creatively projects absolute worst-case scenarios. Examples: hit by a bus, down with the flu, disaster power outage, test environment equipment failure, business fails regulatory check, etc.
<b>Recovering Value</b>	The BKPM alternative to ineffective "lessons learned," a strategy to extract value from the project experience and results to benefit the organization and future projects.
<b>Risk Management</b>	A six-step approach to managing recognized risks that results in contingency planning and/or communication (access portal development).

BKPM Principle	Description
<b>Shredders</b>	These are barriers to project success. Unlike normal barriers that can be overcome at the PM level, shredders are cultural barriers in your organization that may only be overcome by applying constant pressure at the corporate level.
<b>Simplicity</b>	The best approach to any activity is simple, direct, and effective. Elaborate planning introduces variables and risks that cannot be tracked and managed without expending a lot of energy.
<b>SMART+ER</b>	An acronym for a set of standards used to validate and measure project outcomes. (Specific, Measurable, Agreed to, Realistic, Time-constrained, plus Ethical and Rewarded.
<b>Snaking</b>	The process of weaving back through everyone who has a role in plan tasking to make sure they have had a chance to provide a risk evaluation, personal commitment to deliverables and dates, and general awareness of task dependencies.  (Attributed to a Chevron CPDEP concept)

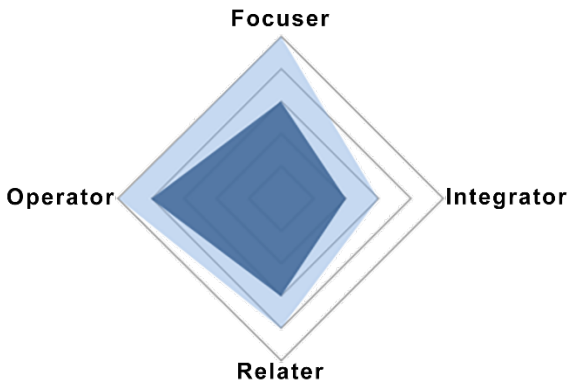
BKPM Principle	Description
<b>Spectrum Analysis</b>	A thought process step in which you challenge your instinctive perception of a risk, constraint, or possible solution. Slow down and think best case, worst case and what could possibly go wrong to invalidate your assumptions of the situation.
<b>Strategic Marketing</b>	Just getting things done isn't always enough. Sometimes a PM must strategically market or communicate plans and accomplishments in order to maintain momentum and drop barriers to implementation of planned activities.
<b>Tempo</b>	"I think fast, talk fast, and I need you to act fast..." -- Winston Wolfe. We use tempo as one technique to establish control in a project, whether intentional or not. Thinking fast and moving fast for a client makes it easier for them to contribute and they appreciate the sense of urgency
<b>Three-Sided Table</b>	A BKPM approach to project management in which the BKPM owns the process (but not the outcome), the sponsor or customer owns the outcome (but not the process), and the partners and team own the technical solution.

BKPM Principle	Description
<b>Triple Constraint</b>	The traditional set of constraints that shapes the world of any project, consisting of the time constraint, the cost (or resources) constraint, and the mandatory performance criteria, ranked in order of flexibility and driver, middle constraint and weak constraint.
<b>Unafraid of Conflict and Confrontation</b>	A core competency of a BKPM that results in proactive responses to unknown, risk resolution and planning, and communication.

## Personality Traits of a BKPM

BKPMs have a set of personality traits that describe them at their very core. The ideal BKPM, the BKPM Archetype, is highly operationally disciplined, focused on the project management process and the team, only slightly concerned with maintaining personal relationships, and not very concerned with getting into the creative aspects of developing options for technical solutions.

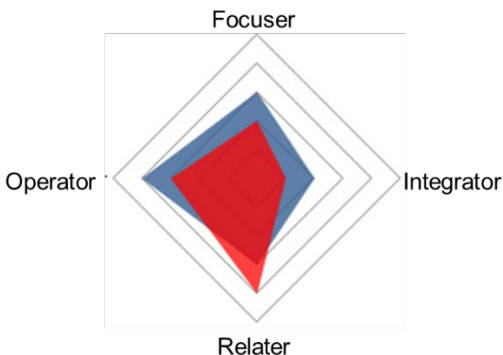
This chart represents the natural resting state of an ideal Bare Knuckled Project Manager. The darker area in the center is their natural resting state; however, everyone can expand their zone in time of heightened awareness. A tactical BKPM's zone expands to be even larger, but similar.



<i>Direct</i>	
<i>Task</i>	<b>Focuser</b> <b>Positive Traits</b> <ul style="list-style-type: none"> <li>• Determined</li> <li>• Controlled</li> <li>• Commanding</li> <li>• Authoritative</li> </ul> <b>Negative Traits</b> <ul style="list-style-type: none"> <li>• Domineering</li> <li>• Autocratic</li> <li>• Hard-Headed</li> <li>• Tyrannical</li> </ul>
	<b>Operator</b> <b>Positive Traits</b> <ul style="list-style-type: none"> <li>• Detailed</li> <li>• Accurate</li> <li>• Organized</li> <li>• Methodical</li> </ul> <b>Negative Traits</b> <ul style="list-style-type: none"> <li>• Obsessive</li> <li>• Rigid</li> <li>• Compulsive</li> <li>• Slow</li> </ul>
<i>Indirect</i>	
<i>People</i>	<b>Integrator</b> <b>Positive Traits</b> <ul style="list-style-type: none"> <li>• Imaginative</li> <li>• Creative</li> <li>• Energetic</li> <li>• Future-Directed</li> </ul> <b>Negative Traits</b> <ul style="list-style-type: none"> <li>• Unrealistic</li> <li>• Manic</li> <li>• Unable to Finish</li> <li>• Poor Time Management</li> </ul>
	<b>Relater</b> <b>Positive Traits</b> <ul style="list-style-type: none"> <li>• Listener</li> <li>• Team Player</li> <li>• Loyal</li> <li>• Sympathetic</li> </ul> <b>Negative Traits</b> <ul style="list-style-type: none"> <li>• Unassertive</li> <li>• Conforming</li> <li>• Gushing</li> <li>• Indecisive</li> </ul>

### Operating Within the BKPM Zone

Not everyone's natural preferences and personality traits match the BKPM Archetype. When projects are running well and you are not experiencing stress, most PMs can force themselves to operate in the BKPM zone.



If your natural resting state zone differs from the archetype, you will need to **recognize** when you're operating outside of the zone and **expend energy** to get back into it. Use **BKPM Principles** to get control.

## Think's Rapid Control Process

### 1. Discovery & Immersion

Organize and consume all historical project knowledge and artifacts. Includes meetings with key individuals, review of documentation, etc. Conduct Initial Meeting (reference: Initial Project Meeting: Readiness Review) and follow through on any To Do's and Open Action Items.

**Deliverables:** working knowledge of the project.

**Participants:** Think Account Manager, Strategic PM, Tactical PM, Client Stakeholders

**Work Effort:** Usually 8-24 hours, depending on complexity of the project.

### 2. Planning

Multi-pass planning starting with "Straw Man Plan" development, reflection of plan with key individuals, resource development, timeline/outcome balancing.

**Deliverables:** Draft Project Charter, Project Plan, Resource Plan, List of Risks, other supporting documents as needed.

**Participants:** Strategic PM, Tactical PM, Client Stakeholders

**Work Effort:** Typically 24-80 hours, depending on complexity of the project.

### 3. Validation & Risk Mitigation

The Draft Plan is subjected to the stress of validation and risk mitigation to determine fragility. Involves tough discussions of how risks will be confronted as they emerge in the project.

**Deliverables:** Near-final Project Plan, Resource Plan, Risk Plan, Schedule, Approval to Proceed, and agenda for the Kick-off Meeting.

**Participants:** Strategic PM, Tactical PM, Client Stakeholders

**Work Effort:** Typically 8-40 hours, depending on complexity of the project.

### 4. Kick Off

Think presents the final project documentation package (all documents created in previous steps) to the stakeholder team. Ownership of steps is cemented and ground rules for engagement are discussed and accepted by team members. Final adjustments are made and advertised.

**Deliverable:** FULL PROJECT CONTROL.

**Participants:** Strategic PM, Tactical PM, Client Stakeholders

**Work Effort:** Preparation requires a few hours to a day of work (2-8 hours) culminating with the Kick-off meeting.

## 5. Active Management & Control

Once the kickoff is complete, the Tactical PM will actively control the project by socializing it with appropriate personnel, managing the tempo, conducting weekly review meetings, and by providing reporting and tracking updates. Risks encountered are confronted aggressively.

**Deliverables:** Project Tempo, Weekly Reporting, Active Risk Management of the Project. The process is now owned by the Tactical PM; the outcome of the project is fully owned by the project sponsor.

**Participants:** Strategic PM (as needed for meetings and risk mitigation), Tactical PM, Client Stakeholders

**Duration:** Varies depending on the level of complexity of the project, from 8-40 hours per week by the Tactical PM and a few hours per week by the Strategic PM, as determined by the resource plan.

## **RCP – Initial Project Meeting (Immersion)**

### **Initial Project Meeting: Readiness Review**

The Initial Project Meeting (Immersion) is an activity that is a part of Think's Rapid Control Process. Prior to attending this initial meeting, make sure you are ready and have reviewed the goals of the Initial Project Meeting. Plan exactly how you will facilitate and what you want to achieve. The Initial Project Meeting is designed to qualify project scope, list deliverables (high-level chunks), identify risk and mitigation plans, and agree on commitment dates with the Customer/Sponsor. This meeting enables Project Managers to restate what is known (typically minimal) and quickly build on that knowledge to further immerse in the project. At the conclusion of the Discovery and Immersion phase, conduct a Project Kickoff Readiness Review meeting to present your full project understanding and correct any discrepancies in the early stages of planning.

### **RCP – Initial Meeting**

During Arcogent's RCP – Initial Project Meeting, the PM team, consisting of a Strategic PM (SPM) and Tactical PM (TPM), should facilitate through project discovery discussions using these seven categories as organizers, at a minimum:

1. To Do List (immediate actions during the RCP Initial meeting)
2. Rough Scope Statement (what's in / what's out)
3. Project Plan and Status Reporting (high level chunks)
4. Key Resources
5. Risk Registry (+ draft mitigation)
6. Open Action Items (e.g., known areas that require additional analysis)
7. Commitment Dates

Each of these specific areas define a starting path to get Rapid Control. They are used to capture project related details with the PM team in a short working session, ideally in a 'war room' environment, using a white board or large 'Post It' pads. This methodology allows for a collaborative session and creates a starting point from which the PM can start planning. Each of the categories are described more in depth below.

### To Do List

The 'To Do List' should be a quick action list of items to review/kick off in the RCP Kickoff Meeting. At the conclusion of the RCP – Initial Meeting, the To Do List may include the following items:

1. Review Notes (SPM/TPM)
2. Project Plan and Status Reporting (TPM)
  - a. Create STRAWMAN Plan
  - b. Upload Plan to Arcogent Corporate SharePoint Drive
  - c. Add High Level Chunks (Deliverables) to Project Plan
3. Project Charter (SPM)
  - a. Use Notes to Define Scope Statement
  - b. Draft Initial Charter
4. Risk List (TPM)
  - a. Add initial mitigation statements
  - b. Add to Project Summary Report
5. Key Resources
  - a. Add to Project Plan
6. Budget Review (SPM with Customer/Sponsor)
7. Next Steps
  - a. Create Project Summary Report (Draft)
  - b. Create Executive Summary Report (Draft)

## 8. Commitment Dates

- a. Draft Plan Commitment Date
- b. Hardened Plan Commitment Date
- c. Project Kickoff Meeting: Readiness Review Date (Customer/Sponsor Meeting prior to Kickoff Meeting)
- d. Project Kickoff Meeting Commitment Date

This list can include additional items but is a good start to keep the team moving through the Initial Project Meeting process.

### Rough Scope Statement

No matter how formally (i.e., in a Project Charter) or informally the project scope statement is documented, it is imperative to push on the project scope to test what's in and what's out of scope. The project scope is not only needed to define project level boundaries (e.g., technical capabilities; final deliverables) but is also needed to define the sphere of influence that the PM must control. For example, if your project's outcome owner tells you that, "I have a different team that can take care of that." You need to learn what happens if they don't. Typical responses might include: Are you sure? Should I manage them? If they don't, do you want me to find someone who will? Do we need to discuss options if they don't come through as you expect? Will you have them report progress status to me?

### Project Plans and Status Reporting (high-level chunks)

During the RCP – Initial Meeting, it is important to document the project in high-level chunks and to not dive too deeply into any specific area until the breadth of the project scope is defined. This is a critical error that many PMs will experience while in the stress of facilitating the initial meeting. Your goal is to uncover all areas of the project that may require a process for completion

and will need to be monitored for status. It is also critical to communicate the standards and expectations that you have for level of detail in plans and in reports. Often, the level of detail in a practical plan for a PM will overwhelm other team members and you must learn what level of detail is appropriate for team consumption.

It doesn't matter what tools you use to manage your project plans. What matters is that they contain the level of detail needed to maintain control of the project process (usually task, duration, work, start, finish, precedent, and resources needed), are easily updateable, and communicate realistic tasks and durations.

### **General Rules (they can always be bent for a good reason):**

1. **Tasking should be tracked in chunks** no greater than 5 days, but preferably no greater than every 2 days, either as task complete or percent complete. A great deal of effort must go into maintaining project status. Really, task duration depends on how resources are linked to it. If a single person is responsible for a task that lasts two weeks and that's all they are working on, and it cannot be chunked further to measure progress, then it can be allowed, but caution should be used.
2. **The project plan must remain achievable.** You must not allow tasks to go un-completed without documenting them and adjusting the plan to accommodate (either through re-planning or use of slack). You must have a manageable way to keep them under control; usually, this involves properly vetting

and snaking with all parties. Minor interruptions might be OK, but they may snowball, or worse, develop as blind spots in your planning.

3. **Schedule risk mitigation**, sometimes called contingency, should be allocated to those tasks deemed riskiest. It should not be considered a slush fund that can be consumed by any task that is running long. There is no way to accurately predict downstream impact otherwise and poorly applied contingency is a sign of a project plan that is not well thought out.
4. **“Everyone, review this,” is not a reliable strategy** for communicating task expectations or for learning of potential issues. The PM is likely to be the only individual that can consume all of the detail in a good project plan. If you want good feedback and team awareness, then tasking may need to be broken-out per individual. You should ask (snaking principle):
  - a. Can you get this finished as planned?
  - b. Do you know of anything you need in order to accomplish this and can I help you get it?
  - c. What is the worst thing that could happen that would prevent you from finishing (apply pre-mortem principle)?
5. **Visibility is required** to make your plans anti-fragile. Print them and post them frequently (weekly at least). Require that team members and stakeholders review them. Include a pdf version with every project report. The more visibility a plan has, the better accountability experienced in projects. If everyone knows what is

expected by them, their role, deadlines, and deliverables, they are more prone to own them and report possible expected slippages.

6. A Weekly Status Report (WSR) is a critical tool for project managers. There are hundreds of “correct” formats for WSRs. The key to a WSR is that it communicates what is important and that it is easy and **accurate** to maintain. It doesn’t matter if the report is maintained in Word, Excel or in a central database. What matters is that they are effective for the project.
7. Many WSR templates are pushed down to PMs from a PMO and are rarely focused solely on enabling a project manager to control their projects; they typically place additional burden on PMs so the PMO can report information that is important to the PMO. PMs should test WSR templates to make sure they are simple, direct and effective, and that they do not cause undue burden on running the project effectively.
8. Here are a list of fields that we often find are needed in a WSR:

Field	Description
<b>Project Name</b>	Easily recognizable name
<b>Status as of</b>	Date (mm/dd/yy)
<b>Begin</b>	Project inception date (mm/dd/yy)
<b>Projected Completion</b>	Date (mm/dd/yy)

<b>Active Phase</b>	Discovery & Immersion, Planning, Validation & Risk Mitigation, Kick Off, Active Mgmt & Cntrl, Close Out
<b>Executive Sponsor</b>	Executive (e.g., CFO) name
<b>Project Sponsor</b>	Technical (e.g., CTO/CSO) name
<b>Project Manager</b>	Strategic PM / Tactical PM name(s)
<b>Executive Update</b>	Monthly high-level accomplishments and major activity forecast  Profit/Loss statement; cost projection  Schedule tracking and projection
<b>Overall Health</b>	Color-based health indicator – green, yellow, red, hold (red diagonal lines)
<b>Team Update</b>	Color-based health indicator + Weekly update used to provide status to sponsors, stakeholders, and team members

<b>Major Milestone Updates*</b> (repeat as needed)	Color-based health indicator + Milestone Name + Date range (MM/DD to MM/DD) + Status description
<b>Current Risk Items*</b>	Quick reference ID + Risk/Impact Description + Mitigation Action + Back-up Plan + Owner + Color-based impact rating (L, M, H) + Color-based risk rating (L, M, H) +
<b>Current Action Items*</b>	Quick reference ID + Created date + Description + Actions Taken Log + Owner + Status (New, In Prog, Closed)
<b>Out of Scope / Parking Lot</b>	Quick reference ID + Created date + Description
<b>Change Control Register</b>	Quick reference ID + Classification (budget, time, features, risk) Description and impact on project Requested by + date (mm/dd/yy) Approved by + date (mm/dd/yy)

\* Completed items get moved to archive one cycle after being reported as complete



## Weekly Status Report Template

Project Name			Status as of: mm/dd/yy		
Begin:	mm/dd/yy	Executive Sponsor:			
Projected Completion:	mm/dd/yy	Project Sponsor:			
Active Phase:	Select...	Project Manager:			
<b>Executive Update</b>			Overall Health: <span style="background-color: #90EE90; border: 1px solid black; padding: 2px;"> </span>		
Monthly high-level accomplishments and major activity forecast					
<b>Team Update</b>					
Weekly update used to provide status to sponsors, stakeholders, and team members.					
?					
<b>Major Milestone Updates</b>					
?	Milestone 1 (MM/DD to MM/DD)				
?	Milestone 2 (MM/DD to MM/DD)				
?	Milestone 3 (MM/DD to MM/DD)				
<b>Current Risk Items</b>					
ID	Risk/Impact Description	Mitigation Action	Back-up Plan	Owner	Impact / Risk
					? ?
					? ?
					? ?
<b>Current Action Items</b>					
ID	Date	Description	Actions Taken	Owner	Status
	mm/dd				?
	mm/dd				?
<b>Out of Scope / Parking Lot</b>					
ID	Date	Description			
	mm/dd				
<b>Change Control Register</b>					
ID	Classification	Description	Request/Approval		
	?		Requested by:	mm/dd/yy	
			Approved by:	mm/dd/yy	

## Key Resources

This is fairly simple and straight-forward list of people, hardware, services, software, facilities, etc. Once key resources are identified, you must learn if there are going to be competing demands for those resources, who manages them, and what priority level outside demands have. Many organizations are accustomed to think of resources as though they were fixed. Explore the possibility of outside resources in order to provide options in case of low productivity, technical issues, and/or to find project acceleration opportunities.

## Risk Registry

At first, risks will typically be fairly high-level. Even at this stage, however, they cannot exist as identified risks without some form of mitigating action. The mitigating action doesn't necessarily need to be corrective action, but it must be a plan of action that is discussed and agreed to before the risk manifests itself in the form of project impact. Early in a project think more about process. What are we going to do? Who needs to be involved? How will it affect the triple constraints (principle). Remember the PM owns the process not the solutions. Solutions must come from the team who will execute the solution and must be agreed to by all parties. You will likely leave your side of the three-sided table (principle) in order to facilitate solution discovery and to develop access portals (principle). Leave briefly and get back to your side of the table.

## Open Action Items

Open action items differ from items on the To Do List, but may overlap. Many projects are already in progress at some level and existing open action items may exist. Often they are still open because someone has not taken time to chunk them down

into actionable tasking and does not own the process that will lead them to completion. Open action items often suffer from analysis paralysis and may affect the scope of the project or present risks to the project that must be mitigated. Document open action items and determine what needs to be accomplished to close them out if necessary.

### Commitment Dates

It is critical to discuss the Commitment Dates and ensure these are attainable and realistic dates as these are the earliest indicators to the Customer/Sponsor of Think's performance. The four dates listed below allow the Project Manager to get immersed, meet with key resources, adequately understand the scope of work, determine the resources needed and establish the time the project will needed given the triple constraints (principle).

#### *Draft Plan (STRAWMAN) Commitment Date:*

This is the date the Tactical Project Manager agrees to have a rough project plan in place and is ready to review with the Strategic Project Manager. It is likely that the plan will still have unknowns as this date approaches, but it is important that the TPM's plan aligns with the SPM's vision. During the Draft Plan Review meeting the SPM will walk through the project plan with the TPM to ensure the direction of the project is on target and discuss changes/edits and next steps. Additionally any new risks can be discussed for a mitigation plan.

#### *Hardened Plan (anti-fragile) Commitment Date:*

This is the date the Tactical Project Manager agrees to have a hardened project plan ready for review with the Strategic Project Manager, prior to the Kickoff Readiness Review meeting with

the Customer/Sponsor. This date is typically set a couple of days prior to the Kickoff Readiness Review meeting so the plan should be as close to complete as it can. The TPM should be prepared to complete a 'dry run' walk-through as if presenting to the Customer/Sponsor and be prepared to make any last minute updates prior to the Customer/Sponsor meeting.

*Project Kickoff Meeting: Readiness Review Date:*

This is the date both the Strategic and Tactical Project Managers agree to have a project charter, project plan, a risk registry with mitigation plans, resource allocation report and project summary report ready for presenting to the Customer/Sponsor. This meeting is where the Customer/Sponsor has the ability to ask questions about the plan, therefore it is critical to gain confidence that the project plan is thorough and has enough risk assessment to avoid missing the project completion date.

*Project Kickoff Meeting Date:*

This is the date the Project Managers and the Customer/Sponsor agree to kick off the project and begin executing against the project plan.