The Center for Management Terms & Practices

PROJECTS SUMMARY

The Center's simple tools and quiet facilitation got us moving: we'd been trying to do too much. Our first project summary showed we'd overcommitted ourselves. Our new 1-page goal tree clarified priorities and unlocked energy to focus on the big picture. - Bob Wahlin, President, Stoughton Trailers LLC

Introduction

It's easy to over-commit the management team unless you can see in one place what they're working on and the time and money involved. The **Projects Summary** brings the top issues into focus: status, priority, leadership and of course cost. Used with the Project Planner, it helps people address issues *before* the review meetings.

Updated: May 1, 2018	Priority	Scale	Risk	Status	PM	$Ks	Hrs	Primary Goals	Com
STRUCTURE									See
Create campus master plan	H	M	H		LM	30.0	200	1.1.1	Facili
Run board self-evaluation	M	L	L		DT	0.0	24	1.1.3	Using
Brainstorm new product ideas	L	L	L		BR	TBD	60	2.1.2	Includ
MARKETING & SALES									
Update logo	L	M	L		BD	9.0	80	2.1	Using
Complete competitor research	H	L	L		KL	12.0	24	2.5	Telep
Run annual customer satisfaction survey	H	M	L		KL	2.0	36	2.2	Use s
OPERATIONS									
Change steel vendors	M	L	L		BR	20.0	80	3.1	Cons
Upgrade packaging machine	M	M	M		LM	25.0	120	3.3	Befor
Rework assembly Line X	M	H	H		DT	250.0	1,200	3.3	After
INFORMATION									
Update ERP module X	H	M	H		AA	30.0	80	4.1	Updat
Install and train in business intelligence software	M	L	L		KL	36.0	100	4.2	Comt
Move office applications to the cloud	L	L	L		KL	12.0	36	4.3	Run C

Benefits

The Center's tools minimize omissions, improve communications and foster collaboration. The **Projects Summary**:

- Be able to report to the executives and Board easy and confidently
- Creates regular opportunities to recognize project teams for their contributions
- Keeps from long discussions of projects that are on track

Difficulty	Challenging
Estimated time required	24-40 to set up
Special skills	Excel formatting

Instructions

Start by entering all substantial projects already underway. Then add projects needed to fulfill the overall plan (see the Goal Tree). Use the Project Planner for any complex project.

1. Start by listing all the projects and entering initial ideas about priority.
2. Link to the most relevant strategic goals, using a simple code (see Goal Tree)
3. Fill in the Gantt Chart (time line) last—then revise the sequence as needed
4. During review meetings, establish strict time limits for discussion.
5. Focus first on projects with problems (red) and then those at risk (yellow)

Members can of course contact the Center for assistance: info@theindex.net

Make It Better

Member should share ideas for improving any of the Center's tools and how they're taught and formatted. It's also great to suggest new applications or brand-new tools.

Updated: May 1, 2018

	Priority	Scale	Risk	Status	PM	$Ks	Hrs	Primary Goals	Comments	2018 1QTR	2QTR	3QTR	4QTR	2019 1QTR	2QTR	3QTR	4QTR
STRUCTURE									*See Project Planners for details*								
Create campus master plan	H	M	H		LM	30.0	200	1.1.1	Facilities, phasing, dock and parking flow								
Run board self-evaluation	M	L	L		DT	0.0	24	1.1.3	Using tool from 3GQ Index 1.4.1 Board of Directors								
Brainstorm new product ideas	L	L	L		BR	TBD	60	2.1.2	Includes facilities, enrichment, wellness, sponsorships, etc.								
MARKETING & SALES																	
Update logo	L	M	L		BD	9.0	80	2.1	Using B&W Advertising								
Complete competitor research	H	L	L		KL	12.0	24	2.5	Telephone interviews								
Run annual customer satisfaction survey	H	M	L		KL	2.0	36	2.2	Use same tool. Share summary with all departments								
OPERATIONS																	
Change steel vendors	M	L	L		BR	20.0	80	3.1	Consider future tariff issues								
Upgrade packaging machine	M	M	M		LM	25.0	120	3.3	Before assembly line rework								
Rework assembly Line X	M	H	H		DT	250.0	1,200	3.3	After changing steel vendors								
INFORMATION																	
Update ERP module X	H	M	H		AA	30.0	80	4.1	Update workflow diagrams essential								
Install and train in business intelligence software	M	L	L		KL	36.0	100	4.2	Combine 3 management reports into 1								
Move office applications to the cloud	L	L	L		KL	12.0	36	4.3	Run Cost/Benefit on Office365 vs. Google								
HUMAN RESOURCES																	
Update HRIS	M	H	M		DR	22.0	120	5.1	Need to add training hours								
Update employee engagement survey	H	L	L		DR	0.0	40	5.2	See 5.3.2 Best Practices								
Start new employee blog	M	L	L		SL	0.0	20	5.3	Choose theme per quarter								
FINANCE																	
Run Cost/Benefit Worksheet on Equipment X	H	L	L		HM	0.0	12	6.2	Will need detailed income projections								
Renegotiate Letter of Credit	H	M	M		HM	5.0	40	6.1	Work with attorney								
Update Risk Assessment	M	L	L		SL	0.0	12	6.3	Use Center's Risk Assessment again								
				Totals	$	453	2,284										