

# PROJECT CHECKLIST

initiate | investigate | improve | implement



INITIATE: Use "I" Language		CI Plays a Directing Role (S1)
Step #	Who	Action
1	CI	Call for projects/offer services in context
2	Sponsor	Identify and volunteer an area for improvement
3	Sponsor, CI	Initial scoping and definition of the problem
4	Sponsor, CI	Start with Why (Connection to Citywide/departmental strategy)
5	Sponsor, CI	Identify project risks
6	Sponsor, CI	Identify & recruit initial scoping team
7	CI, Scoping Team	Do just enough baseline research to verify the problem statement
8	CI, Scoping Team	Perform environmental scan
9	CI, Scoping Team	Perform stakeholder analysis
10	Sponsor, CI, Scoping Team	Verify project risks and develop mitigation plan
11	Sponsor, CI, Scoping Team	Create initial draft of project charter
12	Sponsor, CI, Scoping Team	Draft a clear problem statement
13	Sponsor, CI, Scoping Team	Scope the project (horizontally and vertically)
14	Sponsor, CI, Scoping Team	SIPOC/9-step process map - At most!
15	Sponsor, CI	Set well defined boundaries (processes, potential solutions, resources that are off-limits)
16	Sponsor, CI, Scoping Team	Determine targeted outcomes/goals of project
17	CI	Develop recommended approach (best suited tools and approach; project timeline)
18	Sponsor, CI	Agree on methodology/approach
19	Sponsor, CI, Scoping Team	Add proposed project timeline to draft charter
20	Sponsor, CI, Scoping Team	Establish a project team
21	Sponsor, CI, Scoping Team	Determine Team Lead
22	Sponsor, CI, Scoping Team, Project Team	Create final draft of charter
23	Champion, Sponsor, CI	Approve final charter
24	Champion, Sponsor, CI	Decide whether charter is worth investing in
25	Sponsor, CI, Team Lead	Develop communications plan
26	Sponsor, CI, Team Lead	Communicate the vision and approach to key stakeholders
27	Champion, Sponsor, CI	Obtain (citywide) leadership buy-in, create urgency, & build a strong change coalition
28	Sponsor, CI, Team Lead	Establish project management framework (e.g. Kanban)
29	Champion, Sponsor, CI, Project Team	Conduct project kickoff - build excitement and team forming
30	CI, Team Lead, Project Team	Conduct team training/orientation on CI approaches
INVESTIGATE: Use "We" Language		CI Plays a Coaching Role (S2)
Step #	Who	Action
31	CI, Project Team	Create a current state baseline
32	Project Team	Create top level process map
33	Project Team	Review stakeholder analysis (check for missing stakeholders)
34	Project Team	Create detailed process map
35	Project Team, Resources	Add positions/departments to detailed process map
36	Project Team, Resources	Add time to detailed process map
37	Project Team, Resources	Add rules, policies, and regulations to detailed process map
38	Project Team	Determine operational definitions for key terms
39	CI, Project Team	Analyze the current state
40	Project Team	Revisit environmental scan with process now mapped out
41	Project Team	Gather baseline metrics/performance measures (especially measures for targets identified on the charter)
42	Project Team	Investigate and observe actual circumstances (visit physical locations, focus on actual occurrences of problems)
43	Project Team	Explore customer perspective - 3 point definition of waste from customer perspective
44	Project Team	Update stakeholder analysis (with impacts, concerns, and connection points)
45	Project Team	Perform waste/value added analysis
46	Project Team	Identify each step of current state as Value Add/Non-Value Add/Required
47	Project Team	Collect process data for each step (takt time, cost, errors, etc.)
48	Project Team	Perform process flow analysis
49	Project Team	Document and challenge underlying assumptions (e.g. if it's really in Code, find it)
50	Project Team	Perform a root causes analysis - RCA (data intensive, includes pareto diagrams and other quantitative tools)
51	Project Team	Perform bright spot analysis (positive RCA)
52	Project Team	Quantify potential gains from eliminating identified wastes
53	CI, Project Team	Note any quick wins you've identified - you shouldn't be looking at solutions yet, but if you've come across some, consider those
54	CI, Project Team	Note parking lot or out of scope issues so they aren't lost even though we won't address them
55	Sponsor, CI, Project Team	Review Current State (for a kaizen - invite the sponsor to the event)
56	Sponsor, CI, Project Team, Stakeholders	Communicate with all stakeholders to determine unforeseen impacts
57	CI, Project Team	Incorporate stakeholder observations and feedback to current state
58	Champion, Sponsor, CI, Project Team	Evaluate if the problem is still worth solving
IMPROVE: Use "You" Language		CI Plays a Supporting Role (S3)
Step #	Who	Action
59	Sponsor, CI, Project Team	Prioritize root causes and/or bright spots based on stakeholder, champion, and sponsor feedback
60	CI, Project Team	Conduct structured brainstorming activity to generate solutions for prioritized problem areas
61	CI, Project Team	Evaluate and prioritize potential solutions (PICK solutions)
62	Project Team	Develop recommendation proposals (detail-out the potential solutions that seem to have the highest viability)
63	Project Team	Run experiments to test key assumptions regarding the proposed solutions
64	Project Team	Refine proposals
65	CI, Project Team	Quantify forecasted gains from recommended solutions
66	CI, Project Team	Develop a future state map or business model that incorporates impacts of proposed solutions
67	Project Team	Develop high-level standard operating procedures for future state
68	Project Team	Identify quick wins for immediate implementation
69	Sponsor, CI, Project Team	Finalize recommendations and future state
70	Sponsor, CI, Project Team	Develop preliminary change management/implementation plan
71	Sponsor, CI, Project Team	Develop a business case for the change
72	Champion, Sponsor, CI, Team Lead	Obtain formal sponsor/champion approval of recommendations
73	Champion, Sponsor	Approve/Go ahead on quick wins

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IMPLEMENT: Use "You" Language		CI Plays a Delegating Role (S4)
Step #	Who	Action
74	Champion, Sponsor, CI, Project Team, Implementation Team	Communicate proposals to key stakeholders and broader organization
75	CI, Project Team, Stakeholders	Address emergent concerns from stakeholders
76	Champion, Sponsor, CI, Project Team, Stakeholders	Communicate the final future state to customers and key stakeholders
77	Sponsor, CI, Project Team	Identify & recruit implementation team (may be project team, but may not be identical)
78	Champion, Sponsor, CI, Project Team, Implementation Team	Work with management to remove potential obstacles to implementation – obtain resources and set schedule
79	Sponsor, CI, Project Team, Project Team, Implementation Team	Develop final change management/implementation plan
80	Implementation Team	First, execute any "just do it" or quick win opportunities
81	Champion, Sponsor, CI, Project Team, Implementation Team	Celebrate and report out on JDIs
82	Implementation Team	Do small tests of the future state - iterate
83	Sponsor, CI, Project Team, Implementation Team	Develop final change management/implementation plan
84	Champion, Sponsor, CI, Implementation Team	Hold implementation kickoff meeting with stakeholders
85	Implementation Team	Develop, implement, and evaluate pilot
86	Implementation Team, Stakeholders	Make necessary adjustments with stakeholder input
87	Implementation Team, Stakeholders	Perform mistake proofing
88	Implementation Team	Develop lock-in mechanisms and mistake proofing
89	Implementation Team	Develop detailed standard operating procedures for future state
90	Implementation Team, Customers	Provide future state training to customers
91	Implementation Team, Stakeholders	Provide lots of communication and change management
92	Champion, Sponsor, CI, Team Lead	Check in on pilot and mistake proofing (30 day goal)
93	Implementation Team	Develop full-scale implementation plan
94	Champion, Sponsor	Approve full-scale implementation plan
95	Champion, Sponsor, CI, Implementation Team, Stakeholders	Focus on change management
96	Champion, Sponsor, CI, Implementation Team, Stakeholders	Large(st) scale communication about implementation plan
97	Implementation Team	Produce deliverables/future state
98	Champion, Sponsor, Implementation Team	Overcome any emergent barriers to implementation
99	Champion, Sponsor, CI, Team Lead, (Implementation Team)	Check in on implementation plan and execution progress (60 day goal)
100	Sponsor, CI, Team Lead	Monitor implementation/measure against goals - Dashboard
101	Sponsor, CI, Team Lead	Validate effectiveness of proposed solutions
102	Champion, Sponsor, CI, Team Lead, (Implementation Team)	Check in on project outcomes/results (90 day goal)
103	Team Lead, Implementation Team	Document project success and lessons learned
104	Sponsor, CI, Team Lead, Implementation Team	Review parking lots for follow up & future projects
105	Champion, Sponsor, CI, Implementation Team	Celebrate the success with your team – Publicly!
106	Champion, Sponsor, CI, Implementation Team	Communicate the project impact to stakeholders
107	CI	Create CI project summary (one page story)
108	CI	Communicate the project success to CI sponsors and key stakeholders (GPFC, Council, CMO, DU, Executives, etc.)
109	CI	Archive project (clean up files, mark final documents, store in SharePoint)
CELEBRATE: Use "We" language		CI plays a consultative role
110	Everybody	Do it all again! – iterate!!
111	Champion, Sponsor, CI, Teams, Stakeholder	Review parking lots for future projects