

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

The Big Project Picture

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** snaps 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	Goals	Prima	fy	Con
STRUCTURE												
Create campus master plan	H	M	H	L	LM		30.0	200	1.11	Facili		See
Plan board self-evaluation	M	L	L	L	DT		0.0	24	1.13	Using		
Brainstorm new product ideas	L	L	L	L	BR	TED	60		2.12	Includ		
MARKETING & SALES												
Update logo	L	M	L	L	BD		9.0	90	2.1	Using		
Complete competitor research	H	L	L	L	KL		12.0	24	2.5	Telep		
Plan annual customer satisfaction survey	H	M	L	L	KL		2.0	36	2.2	Use s		
OPERATIONS												
Change steel vendors	M	L	L	L	BR		20.0	90	3.1	Cons		
Upgrade packaging machine	M	M	M	L	LM		25.0	120	3.3	Before		
Rework assembly Line X	M	H	H	L	DT		250.0	1200	3.3	After		
INFORMATION												
Update ERP module X	H	M	H	L	AA		30.0	90	4.1	Updat		
Install and train in business intelligence software	M	L	L	L	KL		36.0	100	4.2	Compl		
Move office applications to the cloud	L	L	L	L	KL		12.0	36	4.3	Plan 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

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 (timeline) 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

Users 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.

	Priority	Scale	Risk	Status	PM	\$Ks	Hrs	Primary Goals	Comments	2022				2023					
										1QTR	2QTR	3QTR	4QTR	1QTR	2QTR	3QTR	4QTR		
STRUCTURE										<i>See Project Planners for details</i>									
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																			