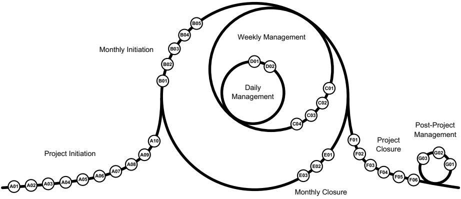
P3.express

The minimalist project management system



This is a downloadable version of the online manual, generated on 2026-07-02. Check the website for newer versions.

P3.express comes from OMIMO (https://omimo.org/en/), which is a family of open, minimalist modules.

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Activity list

Management activities list:

- Project Initiation
    - A01 – Appoint the sponsor
    - A02 – Appoint the project manager
    - A03 – Appoint the key team members
    - A04 – Describe the project
    - A05 – Identify and plan the deliverables
    - A06 – Identify risks and plan responses
    - A07 – Have project initiation peer-reviewed
    - A08 – Make a go/no-go decision
    - A09 – Kick off the project
    - A10 – Conduct a focused communication

- Monthly Closure
  - E01 – Evaluate stakeholder satisfaction
  - E02 – Capture lessons and plan for improvements
  - E03 – Conduct a focused communication

Introduction

P3.express uses a simple process, as shown in the diagram above. This process consists of 33 management activities in 7 groups. Click on any of the activities in the diagram to open its description, or simply start with the first activity, A01.

Principles

Work done in a P3.express project should follow the Nearly Universal Principles of Projects (NUPP). P3.express has itself also been designed to comply with NUPP.

Organization

There’s a **management team**

responsible for the project management activities, with one or more team members, depending on the size and complexity of the project. The **project manager** leads this team and is accountable for the project management activities. This person reports to the external **customer project manager** (if any) as well as the internal **sponsor**, who is a senior manager responsible for the final outcome of the project, for funding and resourcing it, etc.

There are one or more **production teams** in the project. Each internal production team (one with team members from your own organization) is led by a **team leader**, who reports to their functional manager (if any) as well as project manager. Each external production team (suppliers) is led by a **supplier project manager** who reports to their internal managers as well as the project manager.

Documents

The following are the documents defined in P3.express:

- Project Description (template)
- Deliverables Map
- Follow-Up Register (template)
- Health Register (template)

The templates can be used as they are, or used as a guide to creating a customized setup.

It's important to have a central place for your project documents, with scheduled backups, remote access, and authentication and authorization. If your organization doesn't have such platform, you can use one of the following open-source, privacy-aware solutions:

- nextcloud
- Cryptpad

If the team is not co-located, you will also need a team chat platform. The following are a few open-source, privacy-aware options:

- element
- rocket.chat

It’s important to capture risks, issues, and change requests in the Follow-Up Register immediately. With this in mind, you need to set up the system in a way that makes access to the register as easy as possible, including access from your mobile phone. If it’s not possible, use a personal journal to record them, and then transfer them to your register as soon as possible. The following are a few open-source, privacy-friendly note taking applications you can use as a proxy:

- Joplin
- Standard Notes
- Turtl

Tailoring

You can make changes to P3.express to better match it to your environment. However, be careful not to harm the internal consistency of your system when doing so, and keep your system simple. It’s usually better to start with the original form of P3.express, and adjust it gradually in response to your needs, refining those choices by inspection and adaptation.

Perspective

If you have no external customer and no external suppliers, there will be only one perspective to the project; otherwise, each organization involved in the project will have its own perspective. Everything in P3.express should be seen from **your perspective** on the project; e.g., when you're describing the justification of the project in the project description document, describe your own justification, and not that of the external customer. P3.express is not a single system to be used by every party involved in the project, but a system you use for managing the project within your own boundaries.

In addition to the documents, the perspective should also be considered when thinking about the roles. You may be the “project manager” from your own perspective, but you will be considered a “supplier project manager” from the customer’s perspective and a “customer project manager” from your suppliers’ perspective.

History

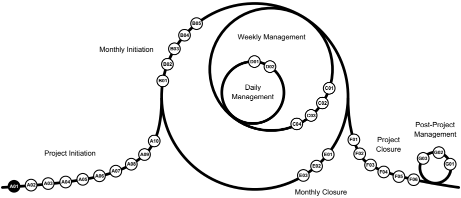
The first version of P3.express was published in June 2016, followed by two minor revisions in 2018 and 2020. The draft of the second version of P3.express was published in March 2021 to garner comments from the public, and the final version was released in May 2021.

In December 2022, the first draft of micro.P3.express was published, which is a flavor of P3.express customized for micro-projects with 1 to 7 team members.

In december 2024, the online P3.express manual and its platform was revised to improve its accesibility.

A01

Appoint the sponsor



The first management activity is for the organization to appoint a senior manager (preferably a board member) as the **sponsor**. The sponsor is the highest role in the project and the **project manager** reports to them.

The sponsor is

- accountable for the justification and outcome of the project,
- responsible for making high-level decisions for the project, and
- responsible for making sure the project is properly funded and resourced.

Purpose

The sponsor’s role is necessary because

- project managers have to be focused on the day-to-day work and the outputs of the project, which distract them and don’t leave them enough time and mental energy to manage the high-level aspects of the project;

- project managers may not have enough organizational power to be able to get resources for the project, or to have enough strategic information to make sure that the project is aligned with other organizational endeavors.

Common pitfalls

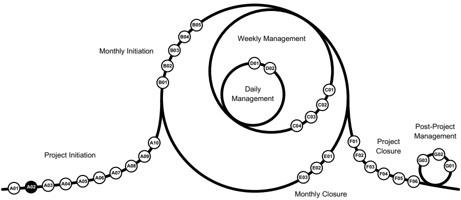
The following should be considered when deciding about the sponsor:

- Sponsors don't have to spend a lot of time on the project, but they still need to be involved and dedicate a small portion of their time to the project.
- Sponsors must feel they own the project and have to protect it, yet they shouldn't hesitate to cancel the project if it loses its justification.

- When possible, you shouldn’t have a single person as the sponsor for all projects because all constants have a tendency to fade and lose their meaning.
- You shouldn’t appoint a single person as the sponsor and the project manager for the same project (unless it’s a single-person project) because they will be distracted by the concrete project management responsibilities and forget about their relatively abstract duties as a sponsor.
- Project managers and sponsors should not be micro-managers.

A02

Appoint the project manager



At this time, the sponsor discusses the project with potential **project managers**, and comes to an agreement. It's important to have a project manager who believes in the objectives and targets of the project.

In the case of internal projects (those without external customers), the project manager should come from the business/management side of the organization rather than the technical side. Managers from the technical side are **team leaders** in P3.express.

Besides realizing the project goals and meeting the targets, the project manager is also responsible for the health and safety of the project team, and for creating a pleasant working environment in which team members can advance in their careers.

Purpose

While it's possible for small teams to have a distributed project management system, it's more practical and productive for most projects to have centralized coordination, and the project manager is the head of this centralized coordination system. In this way, the technical experts will not be distracted by management responsibilities and can stay focused on the technical aspects of the project.

Common pitfalls

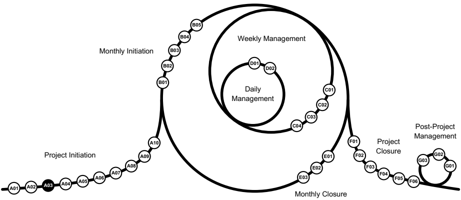
Consider the following to avoid some of the commonest problems in this area:

- Project managers shouldn’t consider themselves as team members’ boss, but as their supporter, facilitator, coordinator, and problem solver.
- Project managers and sponsors should not be micro-managers.

- It’s common to appoint the most senior technical expert as the project manager, which is not a good idea. Project management is a management position, and not a technical one; therefore, you need a person with managerial capability and knowledge to fill this role. Becoming a project manager is not a promotion for a technical expert, but rather a change in career.
- Project managers shouldn’t become involved in the technical aspects of the project because it’s distracting for them, and there are already technical experts to manage the technical aspects.

A03

Appoint the key team members



At this point, the project manager starts forming a team for the project. While the project is not yet approved, and its execution has not begun, key team members are now needed in order to complete the project initiation activity group. These appointments are not preliminary, and the same people selected at this point are expected be the key team members when project execution starts.

The key team members who are probably needed at this point are as follows:

- The management team members
- The team leaders (for internal production teams)
- The supplier project managers (for external production teams)
- Some of the technical production team members

Purpose

One of the purposes of the project initiation activity group is to evaluate the justification of the project, which will be used to decide whether or not it’s a good idea to invest in the project. This information is based on a high-level plan, and proper planning requires the collaboration of a wide range of experts. If not performed well, some beneficial projects may be rejected and some unjustifiable projects may be selected.

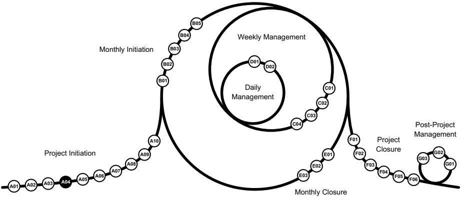
Common pitfalls

Some may consider it a waste of time to work on a project that might not be executed. The project manager should ensure that everyone understands that this is, however, an important investment for the organization because it allows them to select the best projects to invest in. Even if it’s decided not to execute the project, their efforts are not wasted, as they saved the organization from investing its resources in an unjustifiable project.

When it comes to appointing existing people to the project or hiring new people, the organizational governance system has a major role. It’s the responsibility of the sponsor to enable the project manager to have enough say in this selection.

A04

Describe the project



Conduct workshops to gather information and prepare a **Project Description** that contains the following information:

- Purpose and expected benefits
- Expected cost and duration
- Requirements and quality expectations

- A high-level description of in-scope and out-of-scope elements
- A list of stakeholders

Some of the information required for the Project Description doesn’t exist at this point – you should focus only on the existing information and add the rest later. Regardless, this document will be revised and refined throughout the project.

If a similar project has been done before, check its archive and use that information to prepare a more realistic description.

Project Description template

Purpose

This document helps us stay aligned with the high-level goals of the project throughout its execution. It’s also a great resource for new team members, higher level managers, or any other people not inside the team to understand what the project is about.

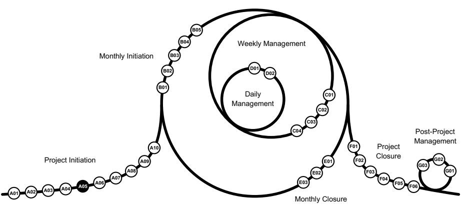
Common pitfalls

There’s an optimal level of detail and accuracy for this document, which is usually lower than what practitioners assume. Make sure you create a document that serves its purpose, rather than just satisfying a preconceived notion of proper project management.

Describe everything clearly and briefly. Avoid the typical kind of corporate statements that don’t communicate any real meaning.

A05

Identify and plan the deliverables



Conduct workshops to create a hierarchical breakdown of the building elements of the product: the deliverables. Where necessary, add short descriptions to deliverables to explain their scope, quality, or other important factors. Store this information in the **Deliverables Map**, which can have any format, such as a mind map.

The Deliverables Map can be elaborated on by including the dependencies among its items. When there are many dependencies, the elements can be scheduled based on their dependencies and estimated durations, whereas when there are not many dependencies, the elements can be prioritized by a proper set of criteria and selected for execution based on priorities and improvisation rather than a schedule. Many projects can benefit from a dependency-based approach for the higher levels and a priority-based approach for the lower levels.

If a similar project has been done before, check its archive and use that information to prepare a better Deliverables Map.

Based on the development of the Deliverables Map, you may need to make adjustments to the Project Description as well.

Project Description template

Purpose

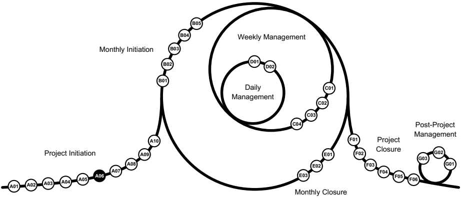
While Project Description is crucial and it's always necessary to be aligned with it, it's abstract and hard to use in day-to-day work. The Deliverables Map bridges the gap by creating a relatively concrete resource that makes the scope of the project clearer. It's also the heart of what becomes a form of schedule for the project, which in turn is a resource that helps us decide what to do next and to measure progress.

Common pitfalls

It’s common for practitioners to think of “work” instead of “deliverables” when creating the Deliverables Map. You need to facilitate the workshop in a way that helps everyone focus on deliverables, independent of the underlying work. To ensure this is the case, use noun phrases instead of verb phrases for naming the deliverables. Sometimes, the use of a mind map can also help because it visualizes the hierarchy of the building elements.

A06

Identify risks and plan responses



Conduct workshops with key team members to first identify risks, and then to plan responses to them. Store the information in the **Follow-Up Register**.

Based on the identified risks and planned responses, you may need to adjust the **Project Description** and the **Deliverables Map** as well.

If a similar project has been done before, check its archive to learn more about the risks related to your project.

[Follow-Up Register template]

[Project Description template]

Purpose

The main reason for identifying risks is to plan responses to them proactively, because it’s much easier and cheaper to control risks before they materialize rather than after.

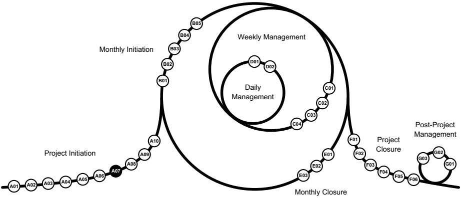
Common pitfalls

The following helps you avoid some of the commonest pitfalls in risk management:

- Don’t record general, unclear items as risks.
- Don’t record general, unclear items as risk responses – only design actionable responses that can be implemented and evaluated.
- Don’t record the potential impacts of uncertain events as risks – it’s the uncertain events themselves that we need to evaluate, and those are what we call risks.
- Assign a custodian to be responsible for the follow-up actions of each risk. It’s best to spread this responsibility among many team members rather than just a few of them.

A07

Have project initiation peer-reviewed



At this point, initiation is almost done, and it's time to ask another project manager in your organization to help you by peer-reviewing your management activities. You should add the result to the **Health Register**.

If the score is too low, you may need to spend more time on the previous management activities before moving on to the next ones, but more importantly, you need to find the root cause and see how you can prevent low scores in the future.

Health Register template

Purpose

The main purpose is to pause and check whether your management activities are OK. Having an external person check your work is beneficial because you may be too close to the work to see some of the issues. Furthermore,

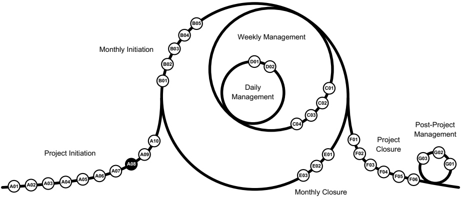
this is an opportunity for people who manage different projects in the organization to see each other's work and learn more in the process.

Common pitfalls

A common risk is that the person reviewing your work may hesitate to point out problems, fearing that it may be taken personally. It’s up to you to create a relationship that ensures they can be comfortable and honest.

A08

Make a go/no-go decision



At this point, the project manager sends the project documents to the sponsor, and the sponsor makes a go/no-go decision. To make this decision, the sponsor may need to discuss the project with other decision makers in the organization, such as the portfolio management layer – but it's up to the sponsor to determine how to do that, and not the project manager.

If you have an external customer and are responding to a request for proposal, in addition to making a go/no-go decision internally, you should also send the proposal to the customer and wait for them to select their supplier and give you the final go/no-go decision. This management activity is completed when the contract is signed, or when you have another legally binding element in place.

If you're going to have external suppliers and some of them were selected in A05, you might want to sign the contract with them at this point. Additional external suppliers may be selected and contracts signed later on an ad hoc basis.

Purpose

Projects that have external customers always have clear go/no-go decisions, but internal projects sometimes lack this step and just creep into existence without a clear decision. It's important to make this a clear gate for the project and have proper signatures and commitments before proceeding.

On the other hand, some organizations just invest in any project as long as they have resources available. This management activity is at the end of a chain of activities that are aimed at turning it into an educated decision based on the justification of the project.

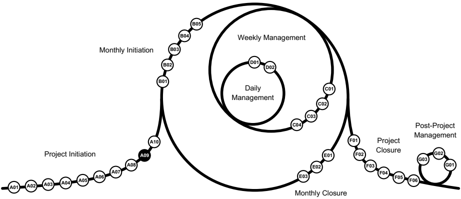
Common pitfalls

Every organization that works with projects needs to have a portfolio management system that evaluates and selects the projects in a holistic way that is balanced and compatible with the strategies of the organization. Many of the problems attributed to project management systems have roots in portfolio management; e.g., having too many projects at the same time.

Make sure everyone understands that a no-go decision is not a failure; it’s a sign of having a successful system that understands what’s not beneficial for the organization, and this wouldn’t be possible without the effort of the key team members in the project initiation activity group.

A09

Kick off the project



If the project has been approved in A08, it's time for the customer and supplier stakeholders to get together and start the project with a kick-off event.

It's best to spend a full day for the kick-off event, preferably somewhere outside the organization. The project manager and the rest of the management team members (if any) should facilitate the event and make sure that it’s a pleasant experience for everyone.

Purpose

This meeting has the following main purposes:

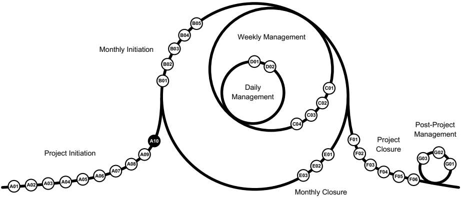
- Making the project official
- Allowing the internal and external stakeholders get to know each other and network
- Communicating the basic information about the project

Common pitfalls

Make sure the kick-off event is not a dry, boring meeting that only goes through the details of the project, but rather is a pleasant experience aimed at team-building.

A10

Conduct a focused communication



Hang a banner in your organization to announce the start of the project (or an equivalent of that for virtual teams), and send an email to everyone to explain why the organization has decided to undertake the project, and what the benefits are.

Purpose

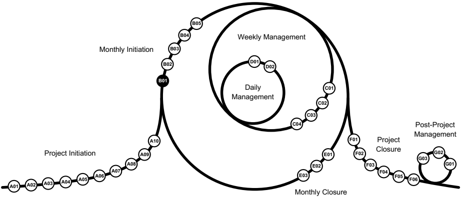
In many organizations, projects start and end with no clear indication, and most employees (and even managers) don’t know the range of projects happening in the organization. This, in turn, causes everyone to be focused on their specialist activities without having a sense of the project as a whole, and without being able to align themselves with the goals and collaborate properly with everyone else. The focused communication is an opportunity to avoid some of these issues by creating commitment and encouraging collaboration.

Common pitfalls

You can’t be at your best unless you’re excited about the project, and when you are, you should be able to communicate that excitement in your communications and create a similar feeling in others. Avoid dry, boring communications.

B01

Revise and refine the plans



Conduct workshops to revise the high-level aspects of the whole plans, and add details and assign custodians to the deliverables that belong to the upcoming month. These refinements impact the **Project Description**, **Deliverables Map**, and **Follow-Up Register**.

If similar projects have been done before, check their archives and use that information to make your plans more realistic.

Project Description template

Follow-Up Register template

Purpose

The plans created in the project initiation activity group are high-level and not sufficient for implementation. They need to be refined one month at a time in this management activity. In any case, all plans should be continuously revised to match the reality.

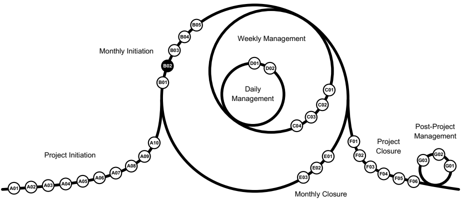
Common pitfalls

Consider the following to avoid some of the commonest pitfalls in this management activity:

- Use facilitation techniques to have an effective planning workshop.
- Don’t focus on detailing the upcoming month only, but make sure that the high-level plan for the whole project is also updated.
- Don’t add too much detail to the plan – include only as much as you need to satisfy the practical needs.

B02

Have the monthly cycle peer-reviewed



Ask another project manager or project management expert in your organization to review and score your monthly management activities, and record it in the **Health Register**. If the score is too low, go back and repeat some of the management activities before proceeding.

Health Register template

Purpose

The main purpose is to pause and check whether your management activities are OK. Having an external person check your work is beneficial because you may be too close to the work to see some of the issues. Furthermore,

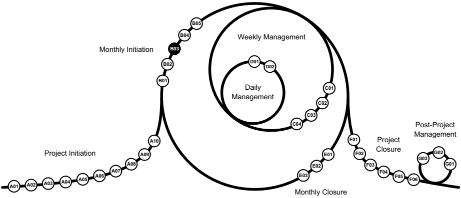
this is an opportunity for people who manage different projects in the organization to see each other's work and learn more in the process.

Common pitfalls

A common risk is that the person reviewing your work may hesitate to point out problems, fearing that it may be taken personally. It's up to you to create a relationship that ensures they can be comfortable and honest.

B03

Make a go/no-go decision



At this point, the sponsor has to make a new go/no-go decision based on the revised plans. They may make the decision by themselves, or arrange it with others such as the portfolio management team.

If the decision is made to stop the project, the project closure activities will be run, and the sponsor should decide whether or not to enter the post-project management cycle.

Purpose

The goal is to make sure the project is still justifiable and to remind everyone that there's a goal for the project higher than the sum of isolated specialist activities.

Common pitfalls

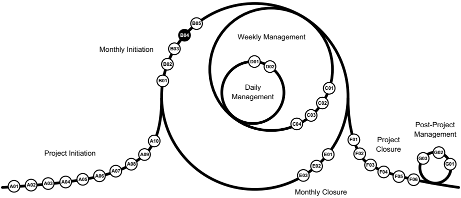
The sponsor has to take this management activity seriously and not just approve the project automatically without inspection. It's important for everyone to understand that canceling projects is a sign of good project management.

Sometimes, a project may be justifiable

when evaluated in isolation, but it may not be as justifiable as other possible projects that you can run. As a result, a holistic perspective is necessary when evaluating the continuous justification of the project, and it’s best done within a single portfolio management system that oversees all the projects in the organization.

B04

Kick off the monthly cycle



When you get the approval in B03, it's time to have a kick-off meeting for the monthly cycle.

Purpose

This management activity has two purposes:

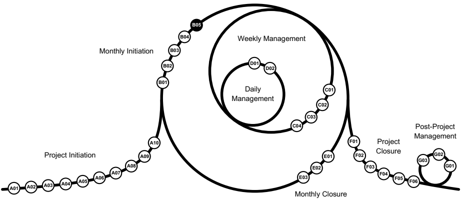
- Team-building
- Informing the stakeholders of the plan for the upcoming month

Common pitfalls

Don’t limit the kick-off to boring, dry speeches and a review of the upcoming month, but instead, create a pleasant experience for everyone, as the team-building aspect of this meeting has priority. You can gather the whole team (plus external stakeholders when possible) and go hiking, go on a picnic, etc., and facilitate it properly to ensure that the two main purposes are satisfied.

B05

Conduct a focused communication



Send a message to everyone and tell them about the expected achievements in the upcoming month and the risks involved. It’s important to let everyone know their role in the overall achievements of the project.

Purpose

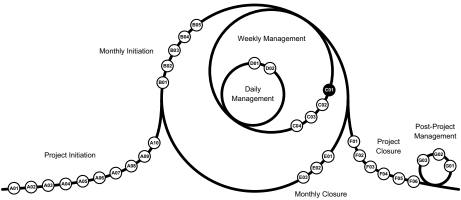
The main goal is to make sure that people involved in the project remain aligned with the overall goals and do not limit their contributions to isolated specialist activities.

Common pitfalls

Keep the message short and clear, and focus on expected achievements rather than planned tasks.

C01

Measure and report performance



Measure the performance of the project compared to its goals, and prepare realistic forecasts for the targets (e.g., time and cost). Prepare one, or multiple reports, with a focus on forecasts, send them to various stakeholders, and check with them to make sure that they have received and understood the report.

Check the list of stakeholders in the **Project Description** to make sure that each of them has received a proper report. If you realize that the current format of the report is not suitable for a stakeholder, revise the format or design a new alternative, and add this information to the list of stakeholders.

Purpose

The main purpose is to understand where we are compared to the targets and goals, which will be used to recover from deviations as soon as possible. The secondary purpose is to keep the relevant stakeholders informed of the status of the project, which in turn creates trust and further potential for collaboration.

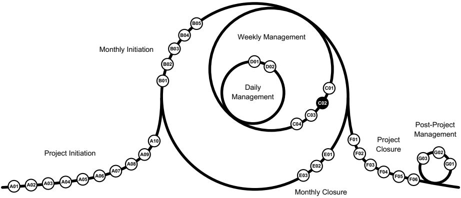
Common pitfalls

Consider the following to avoid the commonest pitfalls in this management activity:

- Don’t try to be too accurate with measurements – find the optimum level of accuracy and detail that can serve the purpose.
- Be careful what you measure: All measurements must match the targets and goals of the project rather than, for example, the amount of resources spent.
- Keep the reports short, simple, clear, and focused on the effective measures of progress. If you send a detailed report to some stakeholders, make sure you also send them a single-page, short version.

C02

Plan responses for deviations



If you have any deviations from your targets based on the performance measurements in C01, you should manage them and try to get back on track.

In complicated cases, you can have a workshop and get help from all or a select group of team members in planning how to recover from the deviation. In critical or sensitive cases, inform the sponsor, ask for their advice, and seek their approval for the recovery plan.

If it's not possible to recover from the deviations, you should seek approval from the sponsor to set revised targets and goals, and have these approved. Make sure that the new information is recorded in the **Project Description**.

If there's an underlying reason for the deviation that may cause similar issues in the future, record it in the **Follow-Up Register** as a risk, and plan a proper risk response for it.

Project Description template

Follow-Up Register template

Purpose

To achieve the goals of the project, we need to recover from deviations as soon as possible, before they pile up. Even more importantly, if we try to recover from the deviations and don't succeed, and see an alarming trend in the project, we will know that the project goals cannot be met with the existing targets, and we have to revise those targets. When revised, they may no longer be justifiable, in which case the project may be canceled to avoid bigger losses in the future.

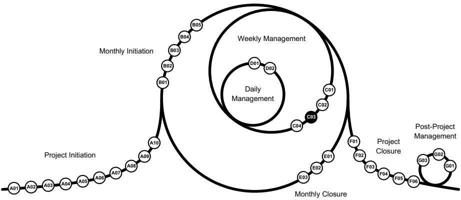
Common pitfalls

Remember that a general, vague, wishful statement such as “We have to work 15% faster from now on” is not a recovery plan. Recovery plans must be realistic and include actionable things that can be implemented and evaluated.

If you must choose between recovering from a deviation and solving the root cause of the deviation, which may cause the same issue in the future, give priority to the latter. Otherwise, you will be continuously firefighting.

C03

Kick off the weekly cycle



In small projects, gather all team members; and in large ones, gather all team leaders, supplier project managers, management team members, and if required, other key stakeholders, to go through the following topics:

- Review what you’re going to do in the upcoming week.
- Review the risks they have in the upcoming week and the existing issues that may expand into the upcoming week, and record them in the **Follow-Up Register**.
- Encourage the teams to limit their work in progress, and get the in-progress work done as soon as possible.

Follow-Up Register template

Purpose

The main purpose is to make sure that everyone is aligned and that there will be no conflicts between the work of teams and individuals.

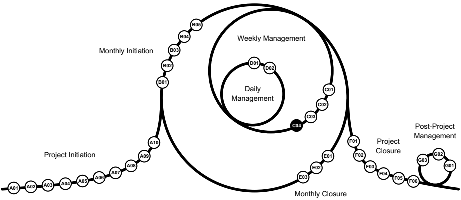
Common pitfalls

The following considerations can help you avoid some of the common pitfalls in this management activity:

- Don’t use this meeting for checking the performance (That’s done in C01).
- Don’t use this meeting to design responses for the identified issues and risks (That’s done in D01).
- Facilitate the meeting to ensure that it doesn’t take too much time, and that sufficient time is spent on each topic.

C04

Conduct a focused communication



Send a short message to everyone involved in the project, and brief them on what's going to be done in the upcoming week, and on the risks that may affect it, as well as the plans to respond to those risks.

Purpose

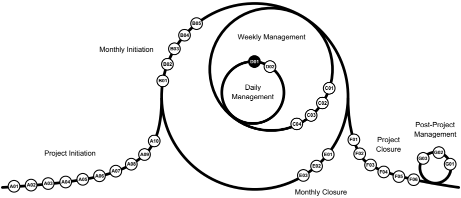
The purpose is to ensure everyone is aligned with the overall goal of the project, and that there won’t be conflicts among the work of individuals, teams, and suppliers.

Common pitfalls

Don’t go through too much detail in this message, but rather keep it simple and high-level.

D01

Manage risks, issues, and change requests



We should manage risks, issues, and change requests proactively. When you identify a new item, you should record it in the **Follow-Up Register** immediately. Then, assign its follow-up activities to a custodian (one of the team members) and start planning responses for the item. You must be continuously in contact with team members and other stakeholders to identify risks and issues.

You can get help from other team members, or even external stakeholders, to respond to items. In complicated cases, you can gather the whole team and facilitate a workshop for all of them to suggest a collective response using the wisdom of the crowd. In critical cases, you should involve the sponsor as well and seek their approval for your response plan.

Follow-Up Register template

Purpose

The main goal is to respond to risks, issues, and change requests proactively rather than letting them resolve automatically. Doing so will give us control and the possibility of getting the best results.

Relying on your memory or on unstructured notes takes too much mental energy and runs the risk of forgetting items. That’s why it’s best to have a simple register and the self-discipline to record items as soon as they are identified.

It takes too much time and energy to manage all the items, and that’s why you need to assign custodians. In addition to spreading the work, it also helps align everyone with the same goal.

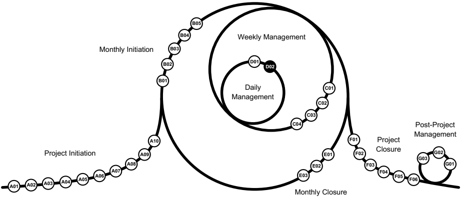
Common pitfalls

Consider the following to avoid some of the commonest problems in this area:

- Don’t add too much assessment information to the Follow-Up Register.
- To ensure that all items are closed properly, you can define thresholds and oblige yourself and others to close items within that threshold.
- Avoid generic, unactionable responses. Responses must be something the team can implement and the custodian can measure.
- Don’t spend all of your time firefighting (managing issues) without paying attention to risks, as unmanaged risks are a major source of future issues.

D02

Accept completed deliverables



Deliverables assigned to team leaders and supplier project managers can be completed any day, and that's the time for a quick review and approval by the project manager. The approval in this management activity is preliminary.

In the case of major or critical deliverables, if possible, seek approval of the sponsor and the customer.

Purpose

Having too much work in progress causes problems – it wastes resources, it may lower quality, and it reduces the predictability of the project. When possible, instead of working on too many deliverables at the same time, you need to encourage everyone to finish and close an item before moving on to the next one.

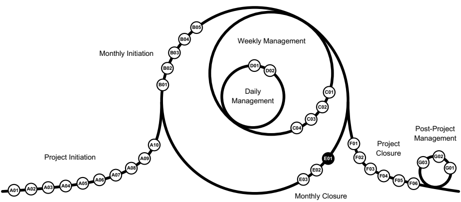
Common pitfalls

Approving a deliverable carries a responsibility, and some project managers delay approvals to avoid this responsibility. This is counterproductive and should be avoided. Don’t be afraid of taking responsibility; some of the deliverables you’ve approved may cause problems in the future, but those problems are not as big as having too many pending deliverables in the project.

Many deliverables quickly approach a nearly-complete state and then run into problems because of a few small difficulties. You may be tempted to mark them as complete because most of the work is done, but you shouldn't do that – you should only approve deliverables that are completely done.

E01

Evaluate stakeholder satisfaction



Send questionnaires to the team members and to the customer, suppliers, or other external stakeholders, to evaluate their satisfaction with the project during the month. Record the results in the **Health Register**. Make sure the evaluation is anonymous.

[Health Register template]

Purpose

It's crucial to have frequent satisfaction evaluations so as to find out about problems and solve them as soon as possible, rather than waiting for undesirable results in the future. This evaluation is not limited to the customer – you should also pay enough attention to the team members, as their satisfaction has a significant impact on the project.

It's important to keep the evaluation anonymous, as otherwise, some people may not be comfortable expressing their true feelings about the project.

Common pitfalls

Don’t limit your evaluation of customer satisfaction to a few representatives – evaluate all influential people.

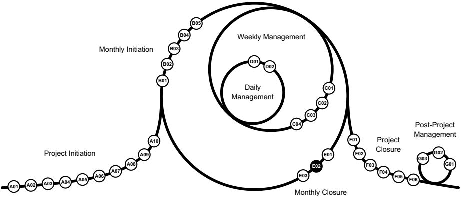
Don’t add too many questions to the questionnaire, so as to keep it easy for the stakeholders to respond.

Even when you do your best to keep the questionnaire anonymous, if there are only a few participants, some of their responses may be identifiable. If this occurs, try to ignore those personally identifiable items, and never use them in the future. Otherwise, some stakeholders may not trust the anonymity of the evaluation.

To ensure that you won’t see personally identifiable information in the event that it does exist, focus on aggregate data and do not review the answers individually.

E02

Capture lessons and plan for improvements



After aggregating the responses to the satisfaction evaluation, invite all team members and facilitate a workshop for them to plan improvements based on the results of the satisfaction evaluation, and to share the lessons they've learned during the month. Record all items in the **Follow-Up**

Register and assign a custodian to each item for its follow-up activities.

Follow-Up Register template

Purpose

This workshop has two main purposes: designing effective improvement plans and team building.

It's helpful to use a workshop for planning improvements instead of planning everything by yourself, because the Wisdom of Crowds can help you generate better plans, and you will also have the team members' buy-in.

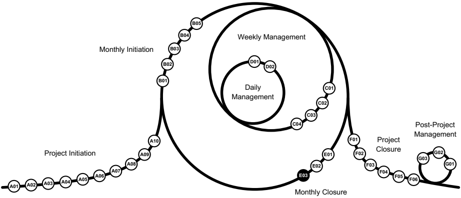
Common pitfalls

Consider the following to avoid some of the commonest problems in this area:

- You can only get proper results from a workshop when it's facilitated properly. You can use techniques such as Delphi in your facilitation.
- When possible, gather the opinions anonymously to ensure that participants are comfortable and can freely express their opinions. You can use a proper software application to ensure anonymity, and also to speed up the process.
- Avoid anchoring people to one or a few ideas, and use a neutral framing for problems.

E03

Conduct a focused communication



Send a message to all team members telling them about the project achievements during the month and thanking them for their contributions.

Purpose

It reminds everyone to stay focused on

the objectives rather than on isolated specialized activities. When done properly, it helps unify the team.

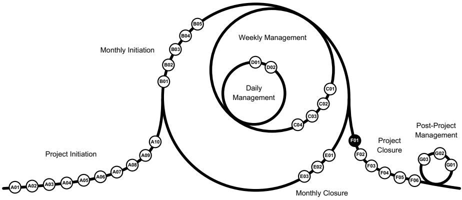
Common pitfalls

Having the following in mind will help you avoid the commonest pitfalls:

- Focus on achievements rather than the amount of work done.
- Keep the message clear and avoid corporate talk.
- Keep the message short – preferably just a few lines.

F01

Hand over the product



When the project is complete, we need to receive approval and hand the product over to the internal or external customer. In cases of canceling the project, this may or may not be required.

Sometimes, the customer accepts the products, but agrees with you on a list of extra tasks you need to do within a certain duration. In such cases, you can proceed and close the project, and hand over the remaining activities to a support/maintenance team.

Purpose

The goal is to have an official hand-over and approval for the product, which is a prerequisite for complete closure of the project. Remember that having projects that are almost done but are frozen in their last stages is a waste of resources and makes your portfolio management complicated. It’s best to close things and move on to new endeavors.

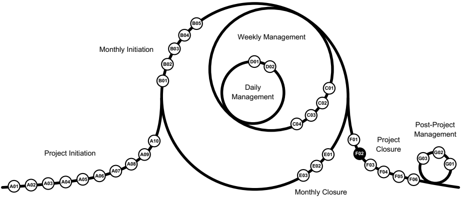
Common pitfalls

This management activity is the major closure in the project, and it can be complicated and time-consuming if you’ve not taken the intermediary closures seriously enough.

When possible, seek approval of the sponsor and the customer for the major deliverables of the project when they are complete, rather than at the end of the project. This simplifies the final closure.

F02

Evaluate stakeholder satisfaction



Send the final anonymous satisfaction questionnaire to the internal and external stakeholders and record the results in the **Health Register**. While each monthly satisfaction questionnaire is focused on a single month, this final evaluation is about the project as a whole.

Health Register template

Purpose

At this time, no particular action can be taken to improve stakeholder satisfaction, and the main purpose of the evaluation is to have it on record for further analysis of the project and to generate lessons learned for future use.

Common pitfalls

Don’t limit your evaluation of customer satisfaction to a few representatives – evaluate all influential people.

Don’t add too many questions to the questionnaire, so as to keep it easy for the stakeholders to respond.

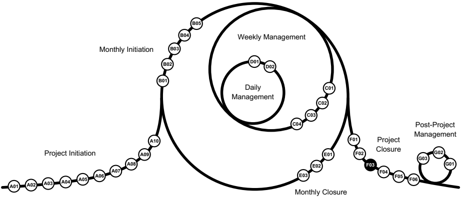
Even when you do your best to keep

the questionnaire anonymous, if there are only a few participants, some of their responses may be identifiable. If this occurs, try to ignore those personally identifiable items, and never use them in the future. Otherwise, some stakeholders may not trust the anonymity of the evaluation.

To ensure that you won't see personally identifiable information in the event that it does exist, focus on aggregate data and do not review the answers individually.

F03

Have the closing activity group peer-reviewed



Ask another project manager or project management expert in your organization to review your management activities and record the results in the **Health Register**. If the score is too low, revise some of the management activities, and then return to this one.

Purpose

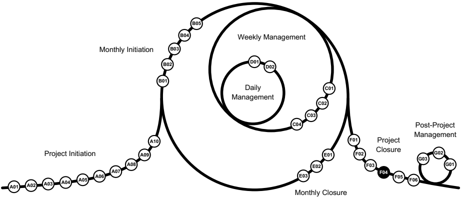
This peer review is done for two reasons:

- To make sure you're ready to end this activity group and the project as a whole.
- To generate useful information you can use to improve your organization-wide project management system. While the standalone scores are important, the trend of your scores among the collection of projects in the organization is more important.

Common pitfalls

A common risk is that the person reviewing your work may hesitate to point out problems, fearing that it may be taken personally. It's up to you to create a relationship that ensures they can be comfortable and honest.

Archive the project documents



Now that we're approaching the end of the project, it's time to archive all project documents.

Purpose

The archive should be safe and available to authorized people in the future, so they can always use this information in their projects instead of reinventing the wheel. The portfolio management system may also need to check this information in the future for more detailed analysis of the past projects.

Common pitfalls

The following are some of the most important things to consider:

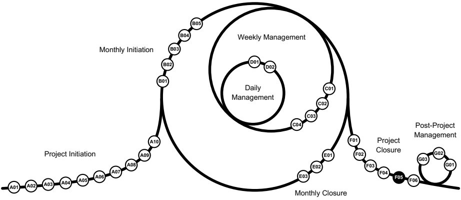
- When possible, make sure the archive is in a single place and the files are not scattered.
- Make sure the archive is read-only.
- Make sure there’s a proper backup system in place so the archive won’t be lost.

- Make sure the archive is safe and that only authorized people have access to it.

In addition to the above, a common problem with documents is that the text is not clear enough, and only people who are actively working with the documents can understand them at the right time and in the right context. Make sure all documents are clear and simple, such that anyone who is unfamiliar with the exact context of the project can understand them. This strategy also helps you during long projects, as it’s very common for internal stakeholders to have difficulty understanding their own documents after a few months.

F05

Celebrate!



Now, it’s time to have a celebration for the team members, or for the whole organization. After this management activity, the project team will be released.

Purpose

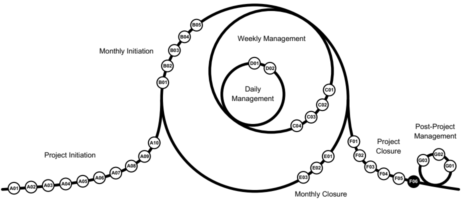
This is an investment for future projects, as it reminds people that they are all working toward the same goal.

Common pitfalls

Make sure it’s a memorable and enjoyable event, and not a dry corporate event with long speeches.

F06

Conduct a focused communication



At this point, the sponsor sends a message to everyone in the organization, announcing the closure of the project and thanking all the team members.

Purpose

There are two purposes to this management activity:

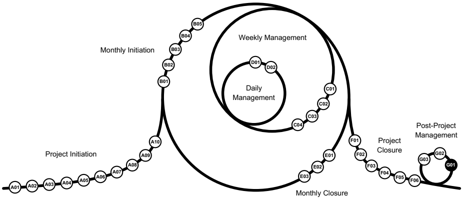
- It shows appreciation for the team members, which encourages them for future projects.
- It helps keep everyone informed about the projects being worked on in the organization, and helps them align with the goals.

Common pitfalls

Keep the message short and clear. If the project was canceled or if it wasn't successful, make sure that your message is positive and encourages people to look forward to better projects in the future.

G01

Evaluate the benefits



The sponsor (or someone on their behalf) should spend a few hours in every post-project cycle, measuring the benefits realized from the project.

Besides the **expected benefits**, the sponsor should be actively looking for **unexpected benefits**, **potential benefits**, and **dis-benefits** as well.

Purpose

We should evaluate the benefits of the project for the following reasons:

- It’s a reminder for the sponsors and other stakeholders that projects are done to generate benefits.
- It helps us understand our environment and become more realistic in future projects.
- It helps us find ways to increase benefits (G02).

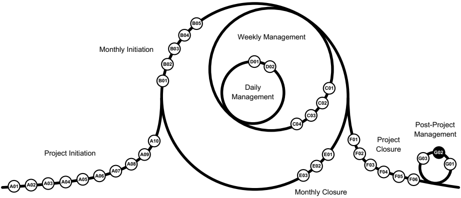
Common pitfalls

You can avoid some of the commonest issues by considering the following:

- The sponsor may have someone else evaluate the benefits, but the sponsor should have complete supervision over them and regard this activity as an important management activity that belongs to the higher management levels.
- A vague, wordy description of the benefits doesn't serve any purpose. The result may be high-level and probabilistic, but it has to stay meaningful and capable of being used in G02.
- Remember that benefits are not limited to monetary ones, and other benefits such as reputation, market share, opportunities, and gained knowledge should also be considered.

G02

Generate new ideas



After evaluating the benefits (G01), the sponsor should check to see whether there are any ways of increasing them. The result may be small activities assigned to the operational teams, or major changes that can become new projects in the future.

Purpose

The main work for the project is done, and you deserve to benefit from it. However, some potential benefits are not realized automatically unless you take extra ad hoc actions after the project closure, and we don’t want to miss this opportunity.

On the other hand, evaluating the benefits of previous projects is a great source of ideas for future projects, and it’s best done in a structured way.

Common pitfalls

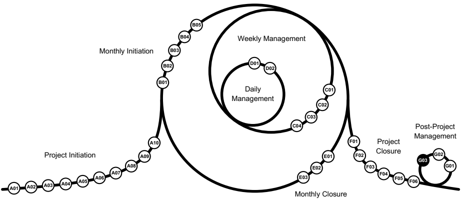
Consider the following to avoid some of the commonest problems in this area:

- Avoid unactionable statements, and focus instead on designing real solutions that can be implemented and evaluated.

- You don’t have to do this management activity by yourself – invite other people to join you, and decide together.
- Don’t limit yourself to evaluating the benefits of each project separately and in isolation – sometimes it works best if you (and other people responsible for other projects) get together and evaluate the benefits of multiple projects together. Just be careful that the benefits of each project you’re responsible for are evaluated in one way or another.

G03

Conduct a focused communication



Send a short message to announce the benefits realized from the project and the plans for improving them. This information may be shared with a small group of authorized people in the organization (e.g., managers and directors), or with everyone. The preference is to share it with everyone.

Purpose

This is a continuous reminder for the recipients that projects are done for their benefit, and they need to consider this in their current and future projects.

Common pitfalls

Considering the following can help you avoid some of the commonest problems:

- Don’t consider everything as confidential, but share the information with the whole organization when possible.
- Keep the message short and clear.
- If you are responsible for multiple small projects, you can combine their reports into one, but make sure that every project is covered.