

# Project Management

## Topic 6.4

### Checklists and Visual Control Boards



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# Checklist



- Common tool often underrated
- Supplemental tool to ensure a task or sequence of tasks is completed
- Created from historical data, experience, and standard templates
- Provides process documentation allowing incorporation of lessons learned

# Three levels of Application

- **Reminder** to ensure completeness
  - Template is maintained and updated with lessons learned
- **Project documentation**
  - Addition of signature, date, and file retention
- **Process control**
  - Add form ID and revision level with date

# Checklists Facilitate Project Integration

- Clear identification of prerequisites
- Clear identification of deliverables
- Aids communication between phases
- Resolves potential conflict issues before they occur
- Provides sense of accomplishment through interim deliverables

# Checklists to Integrate Project Phases

- **Preparation Checklist**
  - Ensures all predecessors are complete prior to starting a project phase
  - Avoid false starts and inefficiencies
- **Deliverables Checklist**
  - Ensures all deliverables are complete after completing a project phase
  - Synchronizes expectations between phases

# 6.4.1 Team Exercise



## Checklists

Learn by Doing Project Management  
Pages 174-175

# Visual Control Board

- Makes a project visible
- Contains following information
  - Overall project information
  - Contact information
  - Project progress and schedules
  - Identifies open issues
- Focal point for team meetings



# Visual Control Board Lessons Learned

- Post information in original form
- Person responsible for info updates board
- Maximize use in presentations
- Meeting focal point and use team's input
- Place in highly visible location
- Archive data as it changes
- Post data on project website as well



# 6.4.2 Team Exercise



## Visual Control Board

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Pages 176-177