

VIEWPOINT PAPER – DECEMBER 2007 Checklist Project Management

By Rebecca A. Winston

During several postings with a variety of clients, it has come to my notice that we have a broad contingency of our practitioners and those who claim to be professionals who are checklist lazy. Yes, some among us have become checklist only project managers. Their thinking skills are limited to the four-corners of the document known as the checklist.

In defense of the checklist, it should be said that the checklist does have a place and utility, but they should not be used as the sole tool on any project. So what is the place and utility of the checklist on a project? First, the checklist can be used as a stimulator to thought. It can be used to stimulate brainstorming or lines of inquisitive discussion for areas such as risk management or value engineering for the project. Second, it can be used as an outline for project review teams or individuals conducting project reviews. Third, they serve to ensure that technical tasks have indeed been completed as intended. And, they can be guides for project managers for whatever part of the project he or she is working to ensure they are completing the tasks that should be completed in the sequence that they should be completed and that all have been completed.

But in no case is the checklist the sole method to perform any task.

By relying on a checklist as the only means for performing a task the project manager not only shows obvious signs of lazy project management skills, but he/she gives up real ownership of the project. Ownership becomes a matter of paper designation rather than an active status. Further, the position the project manager may have had in respect to the project to be able to argue his or her position for resources, priority, or political position, for example, will have been undermined and eroded as much of the material necessary for the interaction with executive or upper management will not be gathered through the use of a checklist only.

Many checklists have questions that are closed questions. They are oriented so the questions are answered by yes or no. For example, are there environmental regulations that must be met? Yes or No? In many circumstances, the project manager has answered either yes or no and left it at that answer without further inquiry. I have seen risk registers where the risk is listed as environmental regulations. Really?

In other instances, the inquiry has been one where the checklist has evoked a listing of the regulations. Without fully understanding the various assumptions surrounding each regulation or the various scenario options that might occur, the question is, how does the checklist information benefit the project manager beyond the formulated listing of the various impending or possibly impending regulations? To capture the list in the risk

register is to capture no risks at all because one does not know any cause, risk, or effect; one only knows the fact that there are environmental regulations.

Looking at a close out or project review checklist, an item pertaining to whether lessons learned have been gathered may be on the checklist. A check noting that the lessons learned have been gathered may suffice for the purpose of the checklist, but should it be sufficient for either the close out of the project review function or for the transition to operations, if that is to occur?

The act of gathering lessons learned does not give complete functionality to the lessons learned. As a project manager more should be required than just checking boxes, if we are to consider ourselves as professionals capable of demanding salaries commensurate of professional standing.

It is time to acknowledge the role of checklists in project management and to do active and interactive project management.



Rebecca Winston, Esq., JD
PMI Fellow
Author



Rebecca Winston, Esq., JD, PMI Fellow, is a former Chair of the board of the Project Management Institute (PMI®). An experienced expert on the subject of project management (PM) in the fields of research & development (R&D), energy, environmental restoration and national security, she is well known throughout the United States and globally as a leader in the PM professional world. Rebecca has over 25 years of experience in program and project management, primarily on programs funded by the US government. She is a graduate of the University of Nebraska's College of Law, Juris Doctorate (1980), in Lincoln, Nebraska and has a Bachelor's of Science (BS) degree in Education from Nebraska Wesleyan University and a Master's Degree in Biology from Iowa State University in the USA. Active in PMI since 1993, Rebecca Winston helped pioneer PMI's Specific Interest Groups (SIGs) in the nineties, including the Project Earth and Government SIGs, and was a founder and first co-chair of the Women in Project Management SIG. She served two terms on the PMI board of directors and was elected a PMI Fellow in 2005. She is a licensed attorney and a member of the American Bar Association and the Association of Female Executives in the USA. She has extensive recent PM experience in the areas of national defense and security, and has worked closely with local, regional and national officials, including federal agencies, the US Congress and the Pentagon. She also serves as a Global Advisor to PMForum and is a PM Ambassador™, available for international speaking engagements. She lives in Idaho Falls, Idaho, USA.