# Project Check-in Calls

CIMcloud Onboarding

# Intended Audience

- Program Manager
- Project Manager

# Why Recurring Project Check-in Calls (Meetings)?

- From kickoff to post-live stabilization
- Simple to plan & execute
- Yields powerful results (vs. the time required)
- Keeps communication flowing
- Holds yourself and other team members accountable
- Keeps project work "top of mind"
- Surfaces issues quickly (so they can be solved)

# Running a Successful Call (Meeting)

- Be prepared
  - Written agenda
  - Issues list (to discuss and solve)
  - Task list (project plan)
- Start & end on time
- Get the appropriate people on the call
- Follow the agenda
- Defer tangent topics to the issues list

# Typical Call Agenda

- ● Status updates on tasks
  - ○ Done (or progress)
  - ○ What's next?
  - ○ Blocking items / issues?

- ● Discuss and resolve issues (from list)
  - ○ Issues = unknowns, risks, problems, questions, blockers, etc
  - ○ Outcomes
    - ■ Solved
    - ■ Add to Task List (with Name)
    - ■ Parked
    - ■ Requires Breakout (which leads to Solved, Task, Parked)

- ● Confirm actions for next check-in
  - ○ Schedule the next check-in call (ideally make it recurring / standing)
  - ○ Email recap and next items due

# Tips

- Book your first (or next call) asap
- Always have a next check-in call on the books
- Vary the frequency (and duration) based on pace
- Understand the meeting pulse
  - Increase in frequency typically reduces duration
  - Why? Most people cram
- Be organized, tactful, and persistent
- Establish and measure against milestones
- PM job = get it done on time, on budget, & on scope
  - Manage & communicate risks (& ask for help)
  - Manage changes (adjustments to time, budget, scope)