

## Project Evaluation Checklist

The Monitoring Stage of Lean Law has three components: Observation, Evaluation and Correction. Monitoring here is not just a passive activity and involves the regular review of the project documents in a structured manner and measuring progress against key milestones. The goal is to spot problems quickly and correct them.

Below are the elements of the Project Evaluation Tool (PET) used as a checklist for the rigorous monitoring of legal projects. This tool is intended to guide your ongoing monitoring activity and can be used in conjunction with the [PROGRESS REVIEW CHECKLIST](#) if you are planning a formal meeting.

### Checklist:

- ☐ Re-open the project plan
  - ☐ Review the plan and observe instances where a deviation from implementation, budget or schedule has occurred
  - ☐ Evaluate the observed deviations and identify the root cause of the deviation
  - ☐ Forecast the impact of deviation on ability to deliver the correct outcome to the client, on time and on budget
  - ☐ Determine how to correct or mitigate the deviation
  - ☐ Develop a follow-up plan to monitor the corrective response against new milestones
  - ☐ Communicate the results of your analysis to the client informing them of the deviation, the corrective plan and its effect on the schedule and budget
  - ☐ Monitor corrective action with lean updates for the client and stakeholders
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### Lean Routine:

1. Have you created an effective project plan or should the plan be reviewed?
2. Are you using a plan that clearly measures both the schedule and the cost of the project so you can easily determine if you are having deviations from the plan?
3. As you confront the inevitable deviations from plan, consider these simple questions:
  - What's happened or not happened?
  - Where are we versus where we expected to be?
  - How did this come about?
  - Is it our plan, our execution or both?
4. Can you estimate the impact of the deviation on your ability to deliver the expected outcome to your client effectively and efficiently?
  - Will we get the client to the right outcome?

- Will we do this within budget and on time?
- 5. Can you recommend a course correction that will get the project back on track for the desired outcome?
- 6. Can you recommend a plan to correct deviations from the approved budget?
- 7. Can you recommend a plan to return your project to the approved schedule?
- 8. Have you considered the theory of marginal gains in project management and that significant progress might be made through the aggregation of small process improvements and course corrections?
- 9. If legal work is going according to plan, have you evaluated whether additional efficiency gains might be made through small process improvements?
- 10. Are you engaging in regular PROGRESS REVIEW meetings with your project team where monitoring work and corrective steps can be discussed and evaluated?
- 11. Have you accounted for the project perennials of time, money and motivation?
- 12. Do you have a plan for communicating the conclusions of your monitoring work to the client?  
Do you need approval to implement corrective action?