



Multi-company Project Management:

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Note: Add Signature, Completion Date, Form Identification, and Revision Level as required to meet your specific project and business situation. The book “**Multi-company Project Management: Maximizing Business Results through Strategic Collaboration**” provides details for use of all checklists listed above.



Team Formation Meeting Facility checklist

Project Title: _____
Team Formation Phase _____
Number of Team Participants _____
Coordinating Project Manager _____

#	Activity	<input checked="" type="checkbox"/>
1.	Flip Charts & Colored Markers for Charts	
2.	Wall Space to Post Charts (Up to 20) and masking tape	
3.	Sufficient Workspace for Everyone to Simultaneously Make Posters.	
4.	Overhead Transparency Projector, markers, & blank sheets. (Note; 3 to 4: portable computers with compatible projector are an alternate.)	
5.	Electronic Chart Board or portable computer with compatible projector.	
6.	Breakout Areas (Minimum 2 Required. Teams greater than 15 will require additional breakout rooms.)	
7.	Room size & layout should easily accommodate all participants sitting on the outside of a U shaped table arrangement	
8.	Copy Machine Readily Available.	
9.	Main room must be available the entire (2) days and secure at night to avoid tear down and set up time	
10.	Plan lunch using a breakout area for set up to avoid meeting interruptions.	
11.	Breakout rooms should be available during the meeting times, but do not require securing at night since there is no setup or equipment to protect	
12.	Clerical person available on computer to enter brainstorming, record action plans, and assist in generating meeting minutes. (Preferred)	
13.	Mission Statement Cards (Engineering, Installation & Start-Up Teams).	



Pre-Leadership Formation Checklist

Project Title: _____

Customer _____ Supplier _____

Key Executive _____ Key Executive _____

Project Manager _____ Project Manager _____

#	Activity	<input checked="" type="checkbox"/>
1.	Establish Strategic value of project to your company & secure support from your Key executive.	
2.	Schedule meeting between initiating and the customer or supplier key executives.	
3.	Present merits & requirements of MPM & determine strategic value to partnering organization.	
4.	Secure agreement between customer and supplier to implement the MPM approach	
5.	Agree on Leadership Team Participants	
6.	Agree on Place, Date, & Duration for Leadership formation meeting	
7.	Verify meeting facility and equipment (checklist Chapter 4)	
8.	Arrange refreshments, lunch	
9.	Finalize Leadership Agenda (Template Chapter 4).	
10.	Prepare & Send invitations signed jointly from both customer & supplier	
11.	Customer & supplier assign agenda topics to participants	
12.	Review available materials on agenda topics from text & other sources as appropriate with assigned topic leaders.	
13.	Review final presentation materials.	



Pre-installation Checklist

Project Title: _____

Installation Lead Company: _____

Install Site: _____ Project Manager: _____

#	Activity	<input checked="" type="checkbox"/>
1.	Meet, secure contact info, & Installation responsibilities from the following Customer personnel: <i>Project Manager Safety Supervisor</i> <i>Engineering Personnel Construction Personnel</i> <i>Installation Supervisor/contractor</i>	
2.	Create a RASIC chart and contact list	
3.	Review all parking, site access, and safety requirements.	
4.	Review job site and establish on site work area	
5.	Review scope & detail specific work requirements for all companies in installation.	
6.	Review Mission & Goals & resolve any open issues assigned to installation.	
7.	Detail site requirements.	
8.	Detail special tools and responsibility for providing tools	
9.	Establish shift hours and starting times for weekdays and weekends with Customer	
10.	Establish installation routine: Meetings, daily log, site board, punch list, checklist, etc.	
11.	Review layouts, machine location, and general equipment info build & testing.	
12.	Review Site preparations & verify completeness by installation start date with Customer	
13.	Review packaging, truck loading plans, and agree on truck sequencing/timing.	
14.	Establish unload area, special equipment, and work site staging area requirements.	
15.	Agree on plant internal equipment move logistics/ timing.	
16.	Review a preliminary installation schedule with manpower requirements.	
17.	With the input & agreement of all parties update the installation schedule and distribute to all participants.	
18.	Establish a scheduled communication links (conf call, e-mail, etc.) with all participants	
19.	Distribute all info gathered from above checklist to affected personnel within Supplier & Customer.	



Design Deliverables Checklist

Project Title: _____

Equipment Identification: _____

Site Locations: _____

Project Manager: _____

#	Activity	<input checked="" type="checkbox"/>
1.	<u>Power Requirements:</u> Machine voltage, Amperage, Phase, Special computer power, and Special grounding requirements.	
2.	Schematics and One Line Diagrams	
3	<u>Air Requirements:</u> Minimum Supply pressure, Maximum Consumption demand CFM, Inlet pipe size, and Air dryer requirements	
4.	<u>Cooling Water Requirements:</u> Cooling water flow rate GPM, Water pressure drop across exchanger, Maximum water inlet temperature, HP heat dissipated, Water inlet and outlet sizes	
5.	<u>Ventilation:</u> Chemical composition of fumes / smoke, # of point sources requiring ventilation, Maximum annual production volume	
6.	<u>Process waste:</u> Type of fluid, MSDS sheets, Max discharge volume and flow rate, and Outlet pipe size	
7.	<u>Oil & lube:</u> Type of fluid, MSDS sheets, Maximum discharge volume in case of spills.	
8.	<u>Foundation Requirements:</u> <ul style="list-style-type: none"> <input type="checkbox"/> Location, size, elevations <input type="checkbox"/> Special base plate drawings <input type="checkbox"/> Tolerances for elevation, flatness, position <input type="checkbox"/> Slope of floor for drains <input type="checkbox"/> Scrap hole location and size <input type="checkbox"/> Special pits for equipment <input type="checkbox"/> OEM minimum recommended pit size 	
9.	<u>Static/dynamic loads for foundation requirements:</u> <ul style="list-style-type: none"> <input type="checkbox"/> Quantity of supports <input type="checkbox"/> Static load on each support <input type="checkbox"/> Dynamic inertia load on each pier <input type="checkbox"/> Dynamic reaction loads on each pier 	



Installation Deliverables Checklist

Project Title _____

Installation Lead Company: _____

Installation Site _____ Project Manager _____

#	Activity	<input checked="" type="checkbox"/>
1.	Mechanical installation of equipment is complete.	
2.	Electrical installation of equipment is complete.	
3.	Live incoming power is connected to control panel(s) disconnect.	
4.	Safety devices (fencing, handrail, light curtains, doors, floor mats, etc.) installed and approved.	
5.	All flooring around equipment is complete – including trench covers.	
6.	All gearboxes and reservoirs (hydraulic, washer, lubrication, etc.) filled.	
7.	All required utilities (air, water, gas, etc.) connected & tested.	
8.	Mechanical integration to adjacent equipment completed.	
9.	Electrical integration to adjacent equipment completed.	
10.	Equipment is grouted – if required.	
11.	Equipment is clean (including surrounding floor area).	
12.	Touch up painting (as needed) completed.	
13.	All inspections and/or approvals are complete for equipment start-up and/or operation.	
14.	Test materials are on site for debug of equipment	
15.	Proven tool(s) are on site for equipment debug.	
16.	Pallets and/or dunnage for part stacking and equipment for handling stacked parts are available.	
17.	Production materials are on site.	
18.	Experienced/trained operators are available for equipment debug.	
19.	Skilled trade personnel are available for equipment debug and/or adjustment.	



Leadership Close Out Checklist

Project Title: _____
 Customer: _____ Supplier: _____
 Key Executive: _____ Key Executive: _____
 Project Manager: _____ Project Manager: _____

#	Activity	<input checked="" type="checkbox"/>
1.	Insure all project phase teams have completed all tasks, summarized achievements, developed lessons learned , and received recognition	
2.	Quantify and summarize all results in final report to Leadership	
3.	Insure reported results relate directly to the initial goals established by the Leadership team.	
4.	Measure Customer Satisfaction using standard company reporting forms	
5.	Request all participants generate a lessons learned list	
6.	Agree on Place, Date, & Duration for Leadership close out meeting	
7.	Create and Distribute MPM process Evaluation Surveys to all Leadership personnel.	
8.	Collect MPM surveys from all participants	
9.	Summarize MPM evaluations with anonymity and prepare presentation for Leadership	
10.	Verify meeting facility/network and equipment	
11.	Make appropriate plans for Leadership celebration timed with Close Out	
12.	Finalize Close Out Agenda with Participants covering following items as a minimum: <ul style="list-style-type: none"> – Lessons Learned Review and Discussion – Customer Satisfaction forms – Future Follow Up & Opportunities 	
13.	Conduct Leadership Close Out meeting and Project Celebration	
14.	Publish minutes of Close Out meeting detailing follow up actions and potential business opportunities	
15.	Each company integrates the lessons learned into their processes and procedures as appropriate.	



MPM² Pre-Leadership Formation Checklist

Improvement Title: _____
 Customer: _____ Supplier _____
 Key Executive: _____ Key Executive _____
 Project Manager: _____ Consultant: _____
 Equipment Scope: _____

#	Activity Description	<input checked="" type="checkbox"/>
1	Define Preliminary Scope	
1	Complete opportunity assessment	
2.	Complete environmental assessment	
3.	Customer and Supplier review assessment results and reach agreement to proceed	
4.	Customer and Supplier Contract Established	
5.	Review Customer team structure & improvement efforts	
6.	Agree on Leadership Team Participants	
7.	Agree on Place, Date, & Duration for Leadership formation meeting	
8.	Verify meeting facility and equipment	
9.	Arrange refreshments, lunch	
10.	Customer and Supplier Finalize Agenda	
11.	Prepare & Send invitations	
12.	Secure Customer assignments to present Introductions, Agenda Review, and Customer Perspective	
13.	Assign balance of the agenda items to Leadership participants	
14.	Review presentation materials with assigned personnel	



Pre-Improvement Planning Checklist

Improvement Title: _____
 Customer: _____ Supplier _____
 Key Executive: _____ Key Executive _____
 Project Manager: _____ Consultant: _____
 Equipment Scope: _____

#	Activity Description	<input checked="" type="checkbox"/>
1.	Publish minutes from Leadership formation meeting identifying key areas of improvement and measurement team assignments.	
2.	Create a power point chart of Norms developed by Leadership Team	
3.	Measurement Team completes assignment	
4.	Measurement team prepares presentation	
5.	Agree on Place, Date, & Duration for Leadership improvement planning meeting	
6.	Verify meeting facility and equipment	
7.	Arrange refreshments, lunch	
8.	Finalize Agenda with Customer and Supplier	
9.	Customer to identify presenters from their organization for each of the following agenda items <ul style="list-style-type: none"> – Review Norms from first meeting – Measurement team report – Develop improvement team assignments – Set Macro timing for Improvement Events – Prepare agenda for first Improvement Event I 	
10.	Assign balance of the agenda items to Leadership participants	
11.	Review presentation materials with assigned personnel	



Pre-Event I Checklist

Improvement Title: _____
 Customer: _____ Supplier _____
 Key Executive: _____ Key Executive _____
 Project Manager: _____ Consultant: _____
 Equipment Scope: _____

#	Activity Description	<input checked="" type="checkbox"/>
1.	Publish minutes from Leadership Improvement Planning meeting identifying improvement goals, improvement team assignments, and macro timing for Events I and II.	
2.	Members from Leadership team to meet with all assigned improvement team personnel to review overall MPM ² process and results of two leadership meetings.	
3.	Members from leadership team to meet individually with each improvement team participant to detail expectations, review their role, and ask them to begin thinking about improvement ideas.	
4.	Verify equipment requirements defined during improvement planning and subsequent discussions with improvement personnel are all in place.	
5.	Verify material requirements defined during improvement planning and subsequent discussions with improvement personnel are all in place	
6.	Verify personnel requirements defined during improvement planning and subsequent discussions with improvement personnel are all in place	
7.	Prepare contingency plans to address any potential weaknesses in the above equipment, material, or personnel requirements.	
8.	Conduct a Pre-Event I conference call with key planners and participants to review preparations and agenda for Event I	
9.	<p>Insure a full time facilitator is identified for Event I to help the team in the following areas:</p> <ul style="list-style-type: none"> – Brainstorm improvement ideas – Select best solutions – Develop improvement plan – Monitor plan execution – Assist in preparing report out to leadership <p>Note: Facilitation role may be fulfilled by a qualified project manager or 3rd party.</p>	
10.	Set time, date, and place for Event I report out	
11.	Identify and confirm Leadership participants for Event I Report Out.	



Pre-Event II Checklist

Improvement Title: _____
 Customer: _____ Supplier _____
 Key Executive: _____ Key Executive _____
 Project Manager: _____ Consultant: _____
 Equipment Scope: _____

#	Activity Description	<input checked="" type="checkbox"/>
1.	Publish Event I report and distribute to all participants and involved personnel	
2.	Members from Leadership team to meet with all assigned improvement teams to insure understanding of results and clarify homework assignments from Event I	
3.	Monitor progress of Customer homework assignments and verify all assignments will be completed prior to start of Event II	
4.	Monitor progress of Supplier homework assignments and verify all assignments will be completed prior to start of Event II	
4.	Verify equipment requirements defined for Event II are all in place.	
6.	Verify material requirements defined for Event II are all in place	
7.	Verify personnel requirements defined for Event II are all in place	
8.	Prepare contingency plans to address any potential weaknesses in the above equipment, material, or personnel requirements.	
9.	Conduct a Pre-Event II conference call with key planners and participants to review preparations and agenda for Event II	
10.	<p>Insure a full time facilitator is identified for Event II to help the team in the following areas:</p> <ul style="list-style-type: none"> - Brainstorm control ideas - Develop control plan - Monitor plan execution - Assist in preparing report out to leadership <p>Note: Facilitation role may be fulfilled by the PM if qualified or a 3rd party.</p>	
11.	Set time, date, and place for Event II report out	
12.	Confirm Leadership full participation in Event II Report Out.	
13.	Plan appropriate recognition for the improvement team at completion of Event II	



MPM² Close Out Checklist

Improvement Title: _____
 Customer: _____ Supplier _____
 Key Executive: _____ Key Executive _____
 Project Manager: _____ Consultant: _____
 Equipment Scope: _____

#	Activity Description	<input checked="" type="checkbox"/>
1.	Insure improvement teams have received appropriate recognition	
2.	Quantify and summarize all results in final report to customer	
3.	Insure reported results relate directly to the initial goals established by the Leadership team.	
4.	Measure Customer and Supplier Satisfaction using standard reporting forms from each	
5.	Supplier to generate a lessons learned list	
6.	Customer to generate a lessons learned list.	
7.	Agree on Place, Date, & Duration for Leadership close out meeting or conference call	
8.	Verify meeting facility/network and equipment	
9.	Finalize Close Out meeting Agenda with Customer and Supplier covering following items: <ul style="list-style-type: none"> - Lessons Learned Review and Discussion - Customer Satisfaction - Future Follow Up Actions and Opportunities 	
10.	Conduct Leadership MPM ² Process Close Out meeting	
11.	Publish minutes of Close Out meeting detailing follow up actions and potential business opportunities	
12.	Distribute and collect MPM ² Process Evaluation Surveys from all Leadership personnel.	
13.	Summarize MPM ² Process Evaluations and distribute to all Leadership personnel.	