

## PLANNING AND TRACKING LEAD

This checklist captures project related tasks performed by a planning and tracking lead (PTL).

### Planning and Tracking

- PTL-1* Be the primary technical resource for work breakdown, estimation, scheduling, and tracking issues.
- PTL-2* Assist in creation and maintenance of the project plan.
- PTL-3* Organizes all work breakdown and estimation for the project, coordinating input from other leads and team members.
- PTL-4* Assist in creation of the status reports.
- PTL-5* Create and maintain the work breakdown structure and project level estimates.
- PTL-6* Create and maintain the global business schedule.
- PTL-7* Create and maintain milestone and/or release cycle schedules.
- PTL-8* Organize weekly planning and tracking meeting with team.
- PTL-9* Review individual planning and tracking reports as appropriate.
- PTL-10* Oversee planning and implementation of planning and tracking tools.

### Project Management

- PTL-11* Coordinate the identification, estimation, prioritization and execution of work on the project.
- PTL-12* Help maintain the project risks list.
- PTL-13* Set up and maintain tools and processes for issue management.
- PTL-14* Inform the project business manager of risks to planned work and deviations from plan.
- PTL-15* Do MBWA and other management for planning and tracking issues.

### CCB Tasks

- PTL-16* Participate in the regular CCB meetings as needed.
- PTL-17* Coordinate estimates for CCB SCRs.

### Release Creation Tasks

- PTL-18* Monitor work being planned for a release to ensure that it will fit.
- PTL-19* Determine what planned work for a release was accomplished.
- PTL-20* Collect and record measures for project log and archive artifacts as appropriate.