9 Rules for Task Management of Deliverables

1. **A Project is comprised of Packages of Deliverables, which are completed through tasks.**

2. **Only some kinds of tasks are tracked as Action Items.**
   a. Any present "HOLDs" or risks of a HOLD. For example:
      i. Any clarification of scope or missing information
      ii. Any decisions on alternatives needed from project leadership, client, or 3rd party
      iii. Any need to change scope, schedule, budget, or key resources
      iv. Any deliverables ready for a formal approval process (internal checks, authentication, issuing for use)
      v. Lack of resources
   b. NOT: progress updates on how each deliverable changed in the previous week
   c. NOT: needs between disciplines. These can be identified but are to be tracked at the discipline level not as a Deliverables Action Item.
   d. HOWEVER: If the need cannot be met before a HOLD occurs, this is to be brought to project leadership's attention immediately and tracked as an Action Item.

3. **Action Items are tracked at the level of Deliverables and logged.**
   a. The 9 Domains of Task management are a useful mnemonic tool for scanning tasks for holds or risks

4. **Decisions are tracked and logged, associated with the Task.**
   a. Associate decisions by package
   b. What counts as a "decision" worth logging:
      i. Choosing between alternative technical approaches
      ii. Clarifying scope interpretation
      iii. Determining acceptance criteria
      iv. Resolving conflicts between requirements
      v. Deciding to deviate from standards or templates
   c. What doesn't need logging:
      i. Routine engineering judgment within your normal scope
      ii. Following established procedures or standards
      iii. Decisions that don't affect anyone else's work

5. **Changes are tracked and logged, associated with the Decision.**
   a. Several different logged decisions may result in one logged change
   b. While changes are still in consideration, but no decision has yet been made, this can be *'statused'* as a "Risk" in the Task Tracker.

6. **Deliverables are *'statused'* daily and Packages are *'statused'* weekly with planning for the 6 week lookahead. What you should prepare for weekly planning meetings:**
    a. Notable developments in any deliverables
    b. Any present or impending holds, needs for decisions or changes
    c. If delayed or blocked: Why, and what's needed to resolve
    d. Completion projection: Still on schedule or new date
    e. Next 6 weeks: What dependencies do you need from other disciplines
    f. All new project team members, so they can be onboarded by project leadership
    g. Discussions and meetings with client where project leadership was not present (project focused, not casual or social encounters)

7. **Communication occurs across all channels not just through leadership or the task coordinator.**
    a. Discipline teams that need things from each other must be proactive and resolve this together.

8. **There are action item logs at the project, package, and discipline levels.**
    a. The risks and holds identified by the disciplines are transferred up to the package level and triaged, planned for, mitigated, and worked on, and when unresolvable elevated to the project level.
    b. The client can also give information and direction that requires action of the EPC and that's logged at the project level and disseminated to the disciplines and will not appear on the deliverables tracker unless it's responding to a need (information, clarification, decision, approval) or a HOLD develops that requires escalation.
    c. Decisions and approvals by the client are logged in the appropriate tracker, with traceability through the action items
    d. The disciplines are responsible for the discipline action items, the project engineer and task coordinator are responsible for the deliverables action items, and the project managers with the EPC and with the client share responsibility for the completion of those action items.

9. **Tools must serve the framework, not dictate it.**
    a. Use tools that enable scanning, tracking, and logging without enforcing workflows contrary to the framework
    b. Select tools with open data formats that prevent vendor lock-in and enable data export
    c. The framework's value is in the coordination architecture, not in any specific tool implementation
    d. Simpler tools that align with the framework are preferable to complex tools that require extensive configuration or workarounds, and will enable agentic workflows with AI more easily