A 1-PAGE CHECKLIST FOR PROJECT LEADS

When to re-baseline

Your plan has drifted and the project is already running. Do you raise a change request, or go back and re-plan? Check the two lists below. If anything in the second list is true, a change request won't fix it.

A change request is enough when all of these are true

- ☐ The scope is the same: same deliverables, same work packages.
- ☐ What changed is dates, effort or a milestone of work packages you already have.
- ☐ You know the cause, and it's local: a supplier slipped, one work package took longer.
- ☐ The rest of the plan still describes how the team will actually do the work.
- ☐ You can explain the change to your sponsor in a few sentences.

Light or strict? Light when the change is small and stays inside the project: a short reason is enough. Strict when it touches objectives, cost, the end date or a commitment to the sponsor: write down the impact and get the sponsor's approval.

In projectbox: a light change request is a work package bar you drag in the timeline, with a one-sentence reason. A strict one has required fields, an impact analysis and the sponsor's approval. Either way, applying it writes the next baseline version: v1.0 becomes v1.1.

Re-baseline when any of these is true

- ☐ Work packages have to be added or removed, not just moved.
- ☐ The forecast end date has stopped meaning anything.
- ☐ Change requests for the same cause keep coming back.
- ☐ The charter changed: objective, scope, budget or sponsor.
- ☐ The team works from a different plan than the one you report on.
- ☐ Stale work packages that nobody will start distort progress and the forecast.

In projectbox: "Zurück in die Planung" (back to planning) sends an executing project back to planning. The plan is editable again, open change requests are cancelled, and booked time, progress, defects and earlier baselines stay. Releasing the plan again creates the next major baseline: v1.x becomes v2.0.

Before you re-baseline

- ☐ Write down why, in a few sentences. You'll need it in the closing report.
- ☐ Tell the sponsor before you start, not after.
- ☐ Keep the old baseline. You'll compare against it at closure.
- ☐ Decide what happens to change requests that are still open.
- ☐ Keep booking time while you re-plan.
- ☐ Check the new plan before you release it: dependencies, milestones, owners.
- ☐ Release it once, as a whole.

Don't re-baseline to

- hide a delay,
- turn the traffic lights green before a steering meeting,
- avoid a decision that belongs to the sponsor.

projectbox keeps every baseline version and shows each return to planning in the version history. Free beta at beta.projectbox.eu. The app is in German for now.