

Project Stabilization Field Guide + Diagnostic Checklist

*How to Take Over a
Project Without Creating
More Chaos*

Taking over a project creates
immediate pressure.

Everyone expects you to fix problems
you didn't create.

The instinct is to act quickly.

Experienced project managers do
something different.

They stabilize the project before they
change it.

This guide walks through the exact
framework I use when I inherit a
project.

How to Use the Guide

- This is **not a checklist to complete in order**
- It's a **framework to diagnose project health**
- The goal is **clarity before action**

*You inherited responsibility.
Not context.*

PHASE 1 — ANCHOR

Understand what was actually agreed.

When you inherit a project, you inherit responsibility immediately.

But you didn't inherit the original context.

Your first step is anchoring the project to what was formally agreed.

Most inherited project confusion begins here.

Teams remember the work differently.

Leadership remembers the commitments differently.

The contract is the only place where expectations were formally defined.

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The contract is the only place where expectations were formally defined.

If you don't anchor to the agreement first, every future decision will rest on assumptions.

Anchor to reality:

If it takes time or money, it should exist in the contract or a modification.

What to Review

Become the person on the project who understands the agreement better than anyone else.

Review the following documentation carefully:

- Contract scope
- Scope of work
- Deliverables
- Performance requirements
- Acceptance criteria
- Order of precedence clauses

Supporting documentation

- Proposal vs awarded contract
- Negotiation notes
- Requirements documentation
- Project charter or project plan

Signals something may be misaligned

- Work discussed in meetings that does not appear in the contract
- Deliverables mentioned informally but not documented
- Scope expectations that differ between teams
- Requirements referenced but not traceable

Your goal in this phase is simple:

Understand exactly what the project committed to deliver.

PHASE 2 — TRACE

Follow the Change Breadcrumbs.

Identify what changed and when.

Inherited projects rarely fail because of one dramatic change.

They drift.

Scope expands quietly.

Schedules adjust informally.

Requirements evolve through conversations instead of documentation.

Over time, the project begins to operate differently than the agreement originally defined.

Tracing these changes helps you understand how the project arrived at its current state.

What to Trace

Look for structural changes that altered the project.

Review:

- Contract modifications
- Additional scope approvals
- Schedule changes
- Budget adjustments

Documentation changes

- Requirement revisions
- Updated deliverables
- Test procedure changes

Updates tracked to each modification

- Schedule modifications
- Resource adjustments
- Cost updates

Signals something shifted

- Modifications approved but not reflected in the baseline
- Informal scope additions
- Schedule updates that don't match actual work
- Requirements changing without documentation updates (associated cost and schedule impacts)

Your objective in this phase is to understand:

How the project moved away from the original agreement and did the move correctly with it.

PHASE 3 — TEST

Validate the Baseline.

The baseline is supposed to represent the project plan.

But in inherited projects, the baseline often drifts away from reality.

Before assuming the team is underperforming, verify that the baseline itself is structurally sound.

When project metrics look wrong, the root cause is often baseline distortion, not team performance.

You are not rebuilding the plan.

You are validating whether the current baseline reflects reality.

What to Test

Scrub the schedule carefully.

You need to evaluate:

Schedule structure

- Are all scope elements represented in the schedule?
- Do dependencies reflect how the work actually flows?

Resource planning

- Are the correct team members assigned?
- Are resource hours realistic?

Cost alignment

- Do cost estimates match reality?
- Were contract modifications incorporated correctly? (This is usually a major contributor.)

Forecasting

- Are forecasts updated regularly?
- Are performance metrics accurate or cosmetic?

Your goal is to answer one key question:

Does the baseline reflect the real project, or an outdated plan?

PHASE 4 — ALIGN

Understand what's actually happening before you act.

Inherited projects are systems.

Before changing the system, you need to understand how it actually operates—not just how it's supposed to operate.

Inside this phase, you are doing three things:

- Observe
- Interpret
- Validate

Observe

See how the project actually runs.

Interpret

Make sense of patterns, gaps, and inconsistencies.

Validate

Confirm your understanding before acting or escalating.

OBSERVE THE SYSTEM

Pay attention to patterns in team behavior and project execution.

Doomsdayers

Team members who immediately dismiss ideas or solutions.

Grenade throwers

People who introduce disruptive problems but take no responsibility.

Scope creepers (Good Idea Fairies)

Team members performing work that is outside the contract scope.

Delayers

Team members who do not meet deadlines, have excuses.

Pretenders

Team members who have no authority but are driving project scope.

Also observe broader team **morale signals**:

- burnout
- change fatigue
- frustration
- low trust
- leadership credibility issues

Schedule one-on-one conversations with key team members.

INTERPRET WHAT YOU'RE SEEING

Look for:

- Work happening outside the defined scope
- Decisions being made without clear ownership
- Expectations that don't match the plan
- Patterns that repeat without resolution
- Misalignment between teams or stakeholders

Your goal is to move from **activity** → **meaning**

VALIDATE YOUR UNDERSTANDING

Before acting or escalating, confirm that what you believe is happening is actually true.

Check your understanding by:

- Comparing what is reported vs what is actually happening
- Cross-checking information across multiple sources
- Identifying conflicting versions of the project
- Testing assumptions with targeted questions
- Verifying that observed patterns are consistent

Your goal is to avoid acting on partial or incorrect conclusions.

If you cannot clearly explain what is actually happening on the project, you are not ready to act.

PHASE 5 — ELEVATE

Escalate with Context.

Once you understand the project's structure, you can communicate issues clearly.

Escalation is not about assigning blame.

It is about ensuring leadership understands the project's actual condition.

Strong project managers escalate with context, not emotion.

Leadership needs clarity in order to make informed decisions.

How to Escalate Effectively

When raising concerns, structure the conversation clearly.

Communicate:

The issue

What problem exists?

The impact

How does it affect scope, cost, or schedule?

What is known

What facts are confirmed?

What is unknown

What still needs investigation?

Recommended next action

What decision or support is needed?

Remember:

Bad news doesn't get better with age.

Early, clear communication protects both the project and your credibility.

STABILIZATION CHECKLIST

A practical checklist for stepping into an inherited project.

Use this checklist to guide your first stabilization pass through a project.

The goal is clarity before action.

Diagnostic Checklist

Phase 1 — Anchor

Understand what was actually agreed.

- Locate the signed contract / agreement
- Review the scope of work
- Identify deliverables and acceptance criteria
- Confirm performance requirements
- Review order of precedence clauses
- Compare proposal vs. awarded contract
- Review requirements documentation
- Locate the project charter or project plan

Signals something may be misaligned

- Work discussed in meetings that does not appear in the contract
- Deliverables mentioned informally but not documented
- Different teams describing scope in different ways
- Requirements referenced but not traceable

Phase 2 — Trace

Follow the change breadcrumbs.

- Identify decisions that changed project scope, cost, or schedule without formal documentation
- Identify all contract modifications
- Review additional scope approvals
- Review schedule changes
- Review budget adjustments
- Identify requirement revisions
- Review updated deliverables or test procedures
- Confirm baseline updates tied to modifications

Signals something may be misaligned

- Modifications approved but not reflected in the baseline
- Informal scope additions
- Schedule updates that don't match actual work
- Requirements changing without documentation updates

Phase 3 — Test

Validate the baseline.

- Confirm all scope elements appear in the schedule
- Verify dependencies reflect real workflow
- Confirm correct resources are assigned
- Validate resource hours are realistic
- Confirm cost estimates match actual spending
- Verify contract modifications were incorporated into the baseline
- Review forecast updates and performance metrics

Key question

- Does the baseline reflect the real project, or an outdated plan?

Diagnostic Checklist

Phase 4 — Align

Understand what's actually happening.

- Attend recurring project meetings
- Take structured notes on observed patterns
- Observe how issues are raised and resolved
- Identify informal decision makers
- Watch how scope discussions occur
- Look for team signals
- Doomsdayers (constant dismissal of solutions)
- Grenade throwers (introduce problems without ownership)
- Scope creepers (“Good Idea Fairies”)
- Signs of burnout, frustration, or low trust
- Schedule 1:1 conversations with key team members
- Identify who actually influences project decisions
- Schedule 1:1 with customer counterpart
- Compare reported status vs actual work
- Cross-check key assumptions with multiple sources
- Identify conflicting versions of scope or expectations
- Test understanding with targeted follow-up questions
- Confirm patterns are consistent before acting

Phase 5 — Elevate

Escalate with context.

Before escalating, confirm you can clearly answer:

- What is the issue?
- What is the impact on scope, cost, or schedule?
- What facts are confirmed?
- What information is still unknown?
- What decision or support is needed?
- Communicate the issue clearly to leadership
- Document decisions and next steps

Project Stabilization Notes

Phase 1 — Anchor Observations

Signals you notice while reviewing the agreement.

Phase 2 — Change Breadcrumbs

What changes or inconsistencies appear in documentation?

Phase 3 — Baseline Validation

Does the schedule reflect reality?

Phase 4 — Team and Stakeholder Signals

What patterns appear in meetings and conversations?

Phase 4 — Escalation Preparation

What issues need leadership visibility?

Project Stabilization Checkpoint

Before making structural changes to the project, confirm the following:

- I understand what the project originally committed to deliver
- I understand what changed and why
- I trust the current baseline reflects reality
- I understand how the team and stakeholders operate
- Leadership understands the project's current condition

Structural changes should only begin after this point.