

Checklist for Automating Processes to Handle Multiple Projects



- Identify project workflow processes that could benefit from new or increased automation.
- Automate those processes, in order of potential time savings and increased efficiency.
- Create a template for internal stakeholders and clients (with help from the internal team) to use to propose or request a new project.
- Set up an automated process to contact company and project leaders when a new project is proposed. Prompt leaders for their approval and input on ranking project priority level.
- Create a template to produce a detailed project brief for all newly approved projects. The brief should include the final deadline, in context with ongoing projects.
- Set up automated emails or other communications to team members, which provide details on assigned tasks and deadlines for each project. Set up automated deadline reminders, too.
- Set up automated emails or other communications for when each project (and each project phase) begins or ends.
- Set up automated communications that alert project leaders and managers about completed work that needs approval.
- Set up an automated re-ordering of project supplies to ensure that supplies don't run too low.
- Set up an automated system to share progress reports for each project with team members, along with a final status report on finished projects (and how project completion relates to other, ongoing projects).