**Template**

**Agendas and Checklists**

**for**

**Project Management Predictive**

**Principles and Practices**

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***Template Agendas and checklists for Project Management Predictive Principles and Practices***

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**Team Implementers, LLC**

**38342 Humphrey Circle**

**North Ridgeville, Ohio 44039**

**Web:** [**www.TeamImplementers.com**](http://www.TeamImplementers.com)

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**Contact the author at** [**DABaker@TeamImplementers.com**](mailto:DABaker@TeamImplementers.com)

**Table of Contents**

**Agendas**

[**Leadership Team Formation**](#LeadershipTeamFormation) **. . . . . . 1**

[**Engineering Team Formation**](#EngineeringTeamFormation) **. . . . . . 2**

[**Installation and Start Up Team Formation**](#InstallationandStartUpTeamFormation) **. . . . 3**

[**Specification and Engineering Review**](#SpecificationandEngineeringReview) **. . . . . 4**

[**Installation or Startup Fact Finding**](#InstallationorStartUpFactFinding) **. . . . . 5**

[**Leadership Team Regular Meeting Agenda**](#LeadershipRegularMeeting) **. . . . 6**

[**Engineering Team Regular Meeting Agenda**](#EngineeringRegularMeeting) **. . . . 7**

[**Leadership Project Closeout**](#LeadershipProjectCloseout) **. . . . . . 8**

**Checklists**

[**Pre-Leadership Formation Checklist**](#PreLeadershipFormationChecklist) **. . . . . 9**

[**Meeting Facility Checklist**](#MeetingFacilityChecklist) **. . . . . . . 10**

[**Design Deliverables Checklist**](#DesignDeliverablesChecklist) **. . . . . . 11**

[**Pre-Installation Checklist**](#PreInstallationChecklist) **. . . . . . . 12**

[**Installation Deliverables**](#InstallationDeliverables) **. . . . . . . 13**

[**Pre-Startup Checklist**](#PreStartupChecklist) **. . . . . . . 14**

[**Leadership Team Closeout Checklist**](#LeadershipTeamCloseoutChecklist) **. . . . . 15**

**Agenda**

**Leadership Team Formation**

* **FIRST DAY**
* **Intro and Kick Off**
* Present Joint Customer/Supplier Concept
* Develop Personal History Presentation
* Personal History (Presented as Individual to Group)
* Agreement on Norms and Team Charter
* **Roles and Responsibilities**
* Develop Organizational Structure Presentation
* Present Organization (Presented as a Company to Group)
* **Lunch**
* Complete Situational Management Matrix
* **Idea Generation**
* Begin Brainstorming Process
* **Evening Social Activity**

**SECOND DAY**

* Complete Brainstorming
* Categorize Brainstorm Data
* **Overall Mission/Goals**
* Mission/goal proposals using ideas generated
* **Working Lunch**
* Agree on Mission Statement
* Agree on Project Goals
* **Develop Action Plans**
* Develop Actions and Assign Responsibility
* Establish Timing Related to Items Assigned to Subgroup
* **Scheduling**
* Agreement on Milestones
* Determine dates or process to establish dates
* **Communication Tools** (Website)
* **Plan Next Meeting and Wrap Up (Entire Group)**
* **Assign Individual to Publish Minutes (Entire Group)**

**Agenda**

**Engineering Team Formation**

**FIRST DAY**

* **Intro and Kick Off**
* Present joint Customer/Supplier Concept (Presented by Project Manager)
* Develop Personal History Presentation
* Personal History Presentation (Presented as Individual)
* Agreement on Norms and Team Charter
* **Roles and Responsibilities**
* Develop Responsibility Chart
* Present Responsibility Chart (Presented as a Company)
* **Lunch**
* **Present Mission/Goals (by Co-Chairs)**
* **Idea Generation**
* Specification and Engineering Review
* Summarize Open Issues Identified in Above Items
* **Evening Social Activity**

**SECOND DAY**

* Review Leadership Brainstorming Items Related to Engineering and Consolidate with Engineering Open Issues (Customer & OEM Project Managers Present to Entire Group)
* Divide Consolidated List into Categories
* **Develop Action Plans**
* Develop Actions and Assign Responsibility
* Establish Timing Related to Items Assigned to Subgroup
* **Working Lunch**
* Subgroups Present Above Action Plans for Concurrence
* Agree on Format to Track Open Issues and Actions
* **Scheduling**
* Develop Macro Project Gantt Chart
* Develop detailed engineering Gantt
* **Communication Tools (Website & Conferencing)**
* **Plan Next Meeting and Wrap Up (Entire Group)**
* **Assign Individual to Publish Minutes (Entire Group)**

**Agenda**

**Installation and Start Up Team Formation**

**FIRST DAY:**

* **Intro and Kick Off**
* Present Joint Customer/Supplier Concept (by Designated Project Mgr.)
* Develop Personal History Presentation
* Personal History Presentations
* Agreement on Norms and Team Charter
* **Roles and Responsibilities**
* RASIC Charting
* **Lunch**
* **Present Mission/Goals (Presented by Co-Chairs to Group)**
* **Idea Generation**
* Develop Statement of Work
* Site Access and Safety Requirements
* Review Install or Startup items from project open issues list
* **Evening Social Activity**

**SECOND DAY:**

* Fact Finding
* OEM Presentations (OEM’s to Entire Group)
* Pre-Conditions
* Special Material, Tools, People
* Macro Timing with Special Items
* Requested Resources, Skilled Trades
* **Action Planning**
* Develop Questions to OEM’s (Entire Group)
* Make Assignments for Missing Data
* Plan visit to manufacturer to observe equipment run off
* **Lunch**
* **Scheduling**
* Work Elements and Resources (Cross Company Sub-Teams)
* Assemble Preliminary Plan network and Gantt (Entire Group)
* Set Date to Finalize the Installation or Startup Plan

**Communication Tools**

* Website
* Weekly Conference Call
* **Plan next meeting and Wrap Up**
* **Assign Individual to Publish Minutes (Entire Group)**

**Agenda**

**Specification and Engineering Review**

**Specification Overview**

Mechanical Cust. Mech. Engr.

Electrical Cust. Elect. Engr.

**Key Points from Pre-Award Meeting** Cust. Project Mgr.

**Customer Processes**

Engineering Change Requests Cust. Project Mgr.

Documentation or as assigned

**OEM Presentations** OEM Project Mgr. or

Mech Engr Concept and Status as Assigned

Controls Architecture and Status

Timing of Engineering Reviews

**Sub-Supplier Presentations** Supplier Project Mgr. or

Mech Engr Concept and Status as Assigned

Controls Architecture and Status

Timing of Engineering Reviews

**Open Issues Review and Assignments**

**Agenda**

**Installation or Start-Up Fact Finding**

**OEM Press System** Press Supplier

- Macro Timeline

- Resources (Quantity and Type)

- Pre-Conditions

- Special tools

- Supplier Support

**Front of Line** Front of line Supplier

- Macro Timeline

- Resources

- Pre-Conditions

- Special tools

- Supplier Support

**End of Line** End of Line Supplier

- Macro Timeline

- Resources

- Pre-Conditions

- Special tools

- Supplier Support

**Site Preparation Planning** Customer Project Mgr.

**Summarize Questions** Designated Project Mgr.

- Review Questions

- Assign Responsibility

- Set Response Date

**Agenda**

**Leadership Regular Meeting**

Agenda Review & Approval Host Key Executive

Review Norms, Mission, & Goals Host Key Executive

Safety Topic Presentation (Optional) Volunteer

Project Status Review

Supplier perspective Supplier PM

Sub supplier perspectives Sub Supplier PM’s

Customer perspective Customer PM

Lunch and Site Tour Host PM

Open Issue Action Items review As Assigned

Escalated Open Issues Issue Representative.

Change Requests Initiating PM

Risk Management Group Exercise

Identify new open issues from the meeting Host PM

Resolve, Delegate, or Assign new items Group Exercise

Wrap Up Host PM

Summarize new decisions and leadership actions

Formalize agreement on next meeting date and site

Assign responsibility and date to publish minutes

Pre or Post Meeting Social Event Host Key Executive

(ie: Dinner, group activity, etc. outside normal business hours)

**Agenda**

**Engineering Regular Meeting**

Agenda Review & Approval Host Key Executive

Review Norms, Mission, & Goals Host Key Executive

Safety Topic Presentation (Optional) Volunteer

Project Design Review

Sub supplier Design Status Sub Supplier PM’s

Sub supplier submission approval Supplier Lead Engr.

Design Submissions & Status Supplier PM

Customer Approval of submissions Customer Lead Engr.

Customer Design perspective Customer PM

Lunch and Site Tour Host PM

Open Issue Action Items review As Assigned

Engineering Change Requests Initiating PM

Identify new open issues from the meeting Host PM

Resolve Delegate or Assign new items Group Exercise

Wrap Up Host PM

Summarize new decisions and Engineering actions

Formalize agreement on next meeting date and site

Assign responsibility and date to publish minutes

Pre or Post Meeting Social Event Host PM

(ie: Dinner, group activity, etc. outside normal business hours)

**Agenda**

**Leadership Project Closeout**

**Location: Customer Site TBD**

**Welcome and Review of Norms Customer Key Exec**

**Review Project Goals and Deliverables Co Lead Key Exec**

**Project Evaluation Customer PM**

**Identify and Detail Follow Up Actions Supplier PM**

**Review Customer Satisfaction Ratings Project Managers**

**Lessons Learned Review and Discussion As Assigned**

Customer Lessons Learned

Equipment Supplier Lessons Learned

Sub Supplier Lessons Learned

Discussion of Key Lessons

**Review and Discuss Process Survey Summary Assigned PM**

**Discussion of Future Opportunities As Assigned**

Customer Perspective

Supplier Perspective

Sub Supplier Perspective

**Wrap Up Host Key Executive**

Verify all issues have been closed

Distribute Process Survey Summary

Assign and set date to distribute minutes

**Project Closure Celebration Event**

**Pre-Leadership Formation Checklist**

Project Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Customer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Supplier: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key Executive: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Key Executive: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Project Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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|  | |  |
| **#** | **Activity** | **☑** |
| **1.** | Establish Strategic value of project to your company & secure support from your key executive. |  |
| **2.** | Schedule meeting between initiating company and the other customer or supplier key executives. |  |
| **3.** | Present merits & requirements of MPM & determine strategic value to partnering organization. |  |
| **4.** | Secure agreement between customer and supplier to implement the joint customer/supplier approach |  |
| **5.** | Agree on Leadership Team Participants |  |
| **6.** | Agree on Place, Date, & Duration for Leadership formation meeting |  |
| **7.** | Verify meeting facility and equipment (checklist Chapter 4) |  |
| **8.** | Arrange refreshments, lunch |  |
| **9.** | Finalize Leadership Agenda (Template Appendix A). |  |
| **10.** | Prepare & Send invitations signed jointly from both customer & supplier |  |
| **11.** | Customer & supplier assign agenda topics to participants |  |
| **12.** | Review available materials on agenda topics from text & other sources as appropriate with assigned topic leaders. |  |
| **13.** | Review final presentation content. |  |

**Meeting Facility Checklist**

**Project Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Team Formation Phase: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Number of Participants: \_\_\_\_\_**

**Coordinating Project Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **#** | **Activity** | **☑** |
| **1.** | Flip charts and colored markers for charts |  |
| **2.** | Wall space to post charts (Up to 20) and masking tape |  |
| **3.** | Sufficient workspace for everyone to simultaneously make charts |  |
| **4.** | Overhead transparency projector with markers and blank sheets or portable computer with projector for each breakout group. |  |
| **5.** | Electronic chart board or portable computer with projector |  |
| **6.** | Breakout areas (Minimum of 2 required) Teams greater than 15 will require additional breakout rooms |  |
| **7.** | Room size and layout to accommodate all participants sitting in a table layout shaped in a U allowing everyone to see each other. |  |
| **8.** | Copy machine readily available |  |
| **9.** | Main room available for duration of team formation and secure at night to avoid tear down and set up time. |  |
| **10.** | Plan lunch using a breakout room for setup to avoid meeting interruptions. |  |
| **11.** | Breakout rooms available during the meeting times, but do not require securing at night |  |
| **12.** | Clerical resource and computer available to enter brainstorming, action plans, and assist with minutes. (Preferred) |  |
| **13.** | After the first leadership meeting have mission and goal cards available for all team meetings including engineering and work teams. |  |

**Design Deliverables Checklist**

Project Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Equipment Identification: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Site Locations: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **#** | **Activity** | **☑** |
| **1.** | Power Requirements:  Machine voltage, Amperage, Phase, Special computer power, and  Special grounding requirements. |  |
| **2.** | Schematics and One Line Diagrams |  |
| **3** | Air Requirements:  Minimum Supply pressure, Maximum Consumption demand CFM,  Inlet pipe size, and Air dryer requirements |  |
| **4.** | Cooling Water Requirements:  Cooling water flow rate GPM, Water pressure drop across exchanger,  Maximum water inlet temperature, HP heat dissipated, Water inlet and outlet sizes |  |
| **5.** | Ventilation:  Chemical composition of fumes / smoke, # of point sources requiring ventilation, Maximum annual production volume |  |
| **6.** | Process waste:  Type of fluid, MSDS sheets, Max discharge volume and flow rate, and Outlet pipe size |  |
| **7.** | Oil & lube:  Type of fluid, MSDS sheets, Maximum discharge volume in case of spills. |  |
| **8.** | Foundation Requirements:   * Location, size, elevations * Special base plate drawings * Tolerances for elevation, flatness, position * Slope of floor for drains * Scrap hole location and size * Special pits for equipment * OEM minimum recommended pit size |  |
| **9.** | Static/dynamic loads for foundation requirements:   * Quantity of supports * Static load on each support * Dynamic inertia load on each pier * Dynamic reaction loads on each pier |  |

**Pre-Installation Checklist**

Project Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Installation Lead Company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Install Site: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Project Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **#** | **Activity** | **☑** |
| 1. | Meet, secure contact info, & Installation responsibilities from the following Customer personnel:  *Project Manager Safety Supervisor*  *Engineering Personnel Construction Personnel*  *Installation Supervisor/contractor* |  |
| 2. | Create a RASIC chart and contact list |  |
| 3. | Review all parking, site access, and safety requirements. |  |
| 4. | Review job site and establish on site work area |  |
| 5. | Review scope & detail specific work requirements for all companies in installation. |  |
| 6. | Review Mission & Goals & resolve any open issues assigned to installation. |  |
| 7. | Detail site requirements. |  |
| 8. | Detail special tools and responsibility for providing tools |  |
| 9. | Establish shift hours and starting times for weekdays and weekends with Customer |  |
| 10. | Establish installation routine: Meetings, daily log, site board, punch list, checklist, etc. |  |
| 11. | Review layouts, machine location, and general equipment info build & testing. |  |
| 12. | Review Site preparations & verify completeness by installation start date with Customer |  |
| 13. | Review packaging, truck loading plans, and agree on truck sequencing/timing. |  |
| 14. | Establish unload area, special equipment, and work site staging area requirements. |  |
| 15. | Agree on plant internal equipment move logistics/ timing. |  |
| 16. | Review a preliminary installation schedule with manpower requirements. |  |
| 17. | With the input & agreement of all parties update the installation schedule and distribute to all participants. |  |
| 18. | Establish a scheduled communication links (conf call, e-mail, etc.) with all participants |  |
| 19. | Distribute all info gathered from above checklist to affected personnel within Supplier & Customer. |  |

**Installation Deliverables**

Project Title\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Installation Site \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Project Manager\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| # | **Activity** | **☑** |
| 1. | Mechanical installation of equipment is complete. |  |
| 2. | Electrical installation of equipment is complete. |  |
| 3. | Live incoming power is connected to control panel(s) disconnect. |  |
| 4. | Safety devices (fencing, handrail, light curtains, doors, floor mats, etc.) installed and approved. |  |
| 5. | All flooring around equipment is complete – including trench covers. |  |
| 6. | All gearboxes and reservoirs (hydraulic, washer, lubrication, etc.) filled. |  |
| 7. | All required utilities (air, water, gas, etc.) connected & tested. |  |
| 8. | Mechanical integration to adjacent equipment completed. |  |
| 9. | Electrical integration to adjacent equipment completed. |  |
| 10. | Equipment is grouted – if required. |  |
| 11. | Equipment is clean (including surrounding floor area). |  |
| 12. | Touch up painting (as needed) completed. |  |
| 13. | All inspections and/or approvals are complete for equipment start-up and/or operation. |  |
| 14. | Test materials are on site for debug of equipment |  |
| 15. | Proven tool(s) are on site for equipment debug. |  |
| 16. | Pallets and/or dunnage for part stacking and equipment for handling stacked parts are available. |  |
| 17. | Production materials are on site. |  |
| 18. | Experienced/trained operators are available for equipment debug. |  |
| 19. | Skilled trade personnel are available for equipment debug and/or adjustment. |  |

**Pre-Startup Checklist**

Project Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Start Up Site: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supplier Project Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Site Project Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| --- | --- | --- |
| # | **Activity** | **☑** |
| 1. | Ensure Installation Deliverables check list has been completed |  |
| 2. | Meet, secure contact info, & Start Up responsibilities from the following Customer personnel  *Project Manager Engineering Personnel*  *Start Up Supervisor/contractor Construction Personnel*  *Key Maintenance Personnel Safety Supervisor*  *Key Production & Quality Personnel Key Training Personnel*  *Parts & Service ordering Personnel* |  |
| 3. | Update RASIC chart and contact list |  |
| 4. | Review scope & detail specific work requirements for companies participating in startup. |  |
| 5. | If Leadership Team is in place, review Mission, Goals, & resolve any open issues assigned to start up. |  |
| 6. | Detail site requirements for startup. |  |
| 7. | Detail any spare parts and identify responsibility for providing the parts with Customer. |  |
| 8. | Establish shift hours and starting times for weekdays and weekends with Customer |  |
| 9. | Review a preliminary Start Up schedule. |  |
| 10. | Agree on manpower & productive material requirements along with responsibility for providing each. |  |
| 11. | Update the startup schedule and distribute to all participants. |  |
| 12. | Review open punch list items from installation & action plans to correct with Customer |  |
| 13. | Review Final Acceptance testing requirements & insure concurrence with Customer |  |
| 14. | Define & reach agreement on Customer training needs |  |
| 15. | Define & reach agreement on Customer onsite support needed from suppliers during ramp up |  |
| 16. | Establish scheduled communication links site suppliers. |  |
| 17. | Distribute info gathered to all affected personnel. |  |

**Leadership Team Closeout Checklist**

Project Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Customer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Supplier: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key Executive: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Key Executive: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Project Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **#** | **Activity** | **☑** |
| 1. | Ensure all project phase teams have completed all tasks, summarized achievements, developed lessons learned, and received recognition |  |
| 2. | Quantify and summarize all results in final report to Leadership |  |
| 3. | Ensure reported results relate directly to the initial goals established by the Leadership team. |  |
| 4. | Measure Customer Satisfaction using standard company reporting forms |  |
| 5. | Request all participants generate a list of lessons learned |  |
| 6. | Agree on Place, Date, & Duration for Leadership close out meeting |  |
| 7 | Create and Distribute process Evaluation Surveys to all Leadership personnel. |  |
| 8 | Collect project management process surveys from all participants |  |
| 9 | Summarize process evaluations with anonymity and prepare presentation for Leadership |  |
| 10. | Verify meeting facility/network and equipment |  |
| 11 | Make appropriate plans for Leadership celebration timed with Close Out |  |
| 12. | Finalize Close Out Agenda with Participants covering following items as a minimum:   * + Lessons Learned Review and Discussion   + Customer Satisfaction forms   + Future Follow Up & Opportunities |  |
| 13. | Conduct Leadership Close Out meeting and Project Celebration |  |
| 14. | Publish minutes of Close Out meeting detailing follow up actions and potential business opportunities |  |
| 15. | Each company integrates the lessons learned into their processes and procedures as appropriate. |  |