

Checklist to Reflect and Unwind Your Project

Winding down a project is a critical part of the project. It's where a project leader summarizes what we set out to accomplish, note monumental milestones, transition ownership to appropriate in-house resources for ongoing support, and itemize the remaining few tasks. A project leader may also like to highlight recommended maintenance, next phases and offer ways to expand or grow the initiative.

Similarly, project leaders also need to summarize, evaluate, and grow their own experience as a project or engagement winds down. When a long engagement comes to an end, you may be a mixed bag of emotions and experience sorrow when leaving the great people you've worked beside, relief in finishing what you set out to do, and delight over the next opportunity.

To process these emotions and capitalize on the personal growth during this wind-down phase, implement this 3-part self-care checklist:

1. Reflect on the Project

- Celebrate personal highlights.** What tactics worked surprisingly well? What noteworthy appreciations and accolades did you receive from business leaders and SMEs? What one thing are you most proud of? Who surprised you by becoming your most prominent advocate and supporter?
- Reconcile your lessons learned.** What did you love about the project? What would you have changed? How would you have navigated a tricky situation - differently? How do these insights affect future projects? How might you select or manage projects differently next time?
- Request testimonials.** Ask colleagues for a LinkedIn recommendation or short testimonial. In your request, suggest a specific skill or value-add scenario you would like them to cover. Offer to draft a recommendation for them to edit and make their own. Make this ask super easy for them.
- Update your LinkedIn profile.** Remember to also update your CV, or capabilities briefing to reflect the engagement. Some companies prefer you do not use their name or publicize the work you did - no problem! Describe the company or organization in general terms - i.e., partnered with a large fintech company's services organization. Then summarize 2-3 significant accomplishments while preserving their identity.
- Formalize connections.** Reach out to team members with your new contact information ensuring connections with colleagues you now consider friends. Make it easy for them to find you for future opportunities. And don't forget to connect with them on LinkedIn.
- Send thank-yous.** Send hand-written notes to those who most impacted you and the project to express gratitude. Skip including a Starbucks gift card and express genuine appreciation for a skill they taught you, a funny memory you shared, or something unique about that individual.

- Polish up processes.** Polish up your templates and procedures based on how you applied them or how the client received them during the engagement. Eliminate, combine, and simplify where possible – making it easier for you and your colleagues to work with you next time.
- Create content.** Think of the ways you can repurpose your learning and insights. What best practices can you share that will position you as a thought leader? Record a success story, share a mishap that you turned around, or compile a data driven insights paper.

2. Process your Emotions

- Give yourself space.** Coming off a project may feel like coming off a wild rollercoaster ride where you feel dizzy, disoriented, and unsure which way to go. Give yourself space to be. Gather and ground yourself.
- Put feelings on paper.** Grab a blank sheet of paper or open a new document and spend 5-minutes noting your feelings. They may range from overwhelm to exhaustion to enthusiasm to humility. Don't filter. Just write. Get all of them out of your brain and on paper and notice how you feel differently – maybe freer or perhaps lighter.
- Transform clutter to clarity.** If a project did not end well, was bumpy, or downright rough – you may find you're cluttered by annoyances, disappointments, and possibly frustration or anger. To bounce back into the right mindset, consider taking those feelings you wrote down and burn the paper as a ceremonial closure. Acknowledge the negative energy of the emotions and do some thing to physically put yourself in a better mindset with greater clarity.

3. Integrate and Move Forward

- Move with grace.** As you move forward, notice how you feel enlivened as you apply your learnings, experience, and renewed energy to the next opportunity. Celebrate and honor this vigor as a wind in your sails.
- Live and learn.** As you dive into the next project engagement, catch yourself before slipping into old patterns. Bring the insights and lessons learned into how to navigate difficult situations differently and apply your proven tactics to move forward effortlessly.
- Make accolades into mantras.** Convert accolades received into personal mantras. Note a short phrase of praise on a sticky note and hang it on your monitor, so you further integrate that energy into how you work and how you show up for work.

This is a time to embrace the enthusiasm of one door closing and another one opening. As you step through that door, know that you bring more insights, depth, and tools to further your work and advance along your journey.

Add this task list now to each project calendar, so you can fully absorb the personal benefits by unwinding yourself while winding down a project.



Erica Smigielski

A passionate organizer of people and initiatives, Erica Smigielski brings over twenty years of experience in project leadership to financial software and SaaS companies who want to launch their next big idea. She leads large-scale, complex projects like product launches and company mergers and acquisitions as well as focused efforts to bring structure and process to fast-track businesses. Erica holds certifications as a Stanford Advanced Project Manager as well as a Certified Group Facilitator, making her a master orchestrator of strategic planning, as well as a skillful communicator who can expertly navigate complex group dynamics.



Victoria Petersen

After two decades as an in-house planner for both association and corporate groups, Victoria knows the inside scoop on how to plan and manage live events. She is a Past President of the International Live Events Association Napa-Sonoma Chapter, active with the American Marketing Association and is integrated with a network of professionals across the country and around the world.

Victoria has a degree in Environmental Design from UC Davis and loves to get her hands dirty creating custom features for her clients. She is a Certified Meeting Professional, Project Management Professional, and Certified Travel Ambassador for Sonoma County, CA, in addition to being certified in Floral Design from Santa Rosa Junior College.

She is based in Wine Country, Sonoma County, CA and also operates in the heartland of St. Croix County, Wisconsin.