

Checklist to Reflect and Unwind Your Project

Winding down a project is nothing new to me, as a skilled consultant providing project leadership and management for financial technology companies. However, this routine exercise is a critical part of the project. It's where I summarize 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. I also like to highlight recommended maintenance, next phases and offer ways to expand or grow the initiative. Skipping these wind-down items may be easier and faster, but leaving them out also leaves out much of the ROI for the organization. Similarly, project leaders also need to summarize, evaluate, and grow their own experience as a project or engagement winds down. I know I'm not alone in my thinking. In a conversation with Victoria Petersen, an honorary member of my project management tribe, we share the same sentiment when a long engagement comes to an end. We both relate to being a mixed bag of emotions at the project closure and speculate many others feel the same. We experience sorrow when leaving the great people we've worked beside, relief in finishing what we set out to do, and delight over the next opportunity.

To deal with these emotions and capitalize on the personal growth during this wind-down phase, implement this 3-part self-care strategy that we've found to be tried and true:

- Reflect on the Project
- Process your Emotions
- Integrate and Move Forward

Reflect on the Project

Winding down a long-term project is more than dotting the 'i's and crossing the 't's of the completed work. The first step is to celebrate personal highlights along the journey, reconcile your lessons learned, request testimonials, and update your LinkedIn profile to reflect the engagement. 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. Consider sending hand-written notes to those who most impacted you and the project and express gratitude. Or one often-overlooked task is to polish up your templates and processes based on how you applied them or how the client received them during the engagement.

Understanding how to connect with your inner self will provide the clarity you need when faced with uncertainty. To do this, start by finding a place that is quiet and relaxing for you. Close your eyes and dive into the silence. Here you can control your breath and the movement of your body. Then begin asking yourself what you genuinely want out of life and comb through your thoughts to find what your body feels right with. Once you can grasp what your mind, body, and soul align with, you can start building the steps as goals to get there.

Process your Emotions

Working on a project can be an emotional roller coaster ranging from overwhelm to exhaustion to enthusiasm to anticipation to humility to disappointment to gratitude. You work hard to organize chaos and navigate 'others' energy to work in lockstep towards the goal while staying one or two steps ahead conditions and others. This allows you to analyze how those past situations were handled and the decisions' rights and wrongs. Then you can apply a similar but more experienced strategy for your current problems. This strategy helps you turn the fog lights on and move slowly through the fog ahead by following your laid out goals. While they stem from the past, your plans to



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of the work. So, when a project reaches the end, you may feel quite a wide range of feelings. While you're relieved to reach your destination (or some variation of it) and comforted knowing your client is pleased - you may consider giving yourself space to be - to gather and ground yourself. You may want to write your emotions down and then burn the paper as a ceremonial closure or perhaps apply the energy of the feelings to do something extra special for yourself.

Integrate and Move Forward

Now that you have processed logistics and emotions in winding down a project - you may notice how you feel enlivened as you integrate and apply your learnings, experience, and renewed energy to your next opportunity. Perhaps you notice how you show up with more grace and ease, and prospect conversations move fluidly. 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. Perhaps convert accolades into personal mantras to further integrate that energy into how you work and show up for work.

Embrace the vigor of one door closing and another one opening. And as you step through that door, know that you bring more insights, depth, and tools to further your work and advance along your journey. Meanwhile, add this checklist detailing our 3-part self-care strategy to your project calendar. You will get the time and attention you need to fully absorb the personal benefits when unwinding yourself while winding down a project.

Some questions to consider: What is on your personal checklist for the wind-down period? How have you successfully implemented a self-care routine when winding down a project? What barriers keep you from doing this?

We welcome you to share additional items to consider amending to this checklist and invite you to connect with us (Erica Smigielski and Victoria Petersen) on LinkedIn.



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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.