

Executive Review of Improvement Projects

Meeting Tool

Objectives of the Executive Review Meeting:

- Discuss whether the project is on track
- If not on track, what are the barriers
- Guide, support and stimulate the project team on will, ideas, execution
- Determine if additional resources are needed .
- Discuss “return on investment” (ROI) and “return on aims” (ROA)

Team Meeting Participants:

- Executive Sponsor
- Project Leaders
- Project Specialist

Pre-meeting preparation

- Know the context for the project, and be prepared to remind the team why the project is important, and how it fits into the overall goals and system-level measures of the organization.
- Read the project report prior to the meeting.
- Communicate with the project leader to establish a meeting agenda and expectations.

Meeting itself

- Start the review by clarifying the aim.
- Review the measures.
- Review the data
- Share with the team two to three good elements of the project and provide encouragement.
- Discuss trends and prognosis for success with the project team.
- If there is any uncertainty about the project’s prognosis, try to determine whether the failure mode is primarily related to Will, Ideas, or Execution. Indicators of each of these failure modes include:
 - Will:
 - Ideas:
 - Execution:

- Discuss the ROI success/opportunities.
- Discuss the ROA success/opportunities.
- Finish the meeting by asking: “Where do you need help from me?”
- Create a list of action steps identified in the meeting.

Meeting Follow-up

- Contact the Project Leaders within 2 weeks to discuss any action steps from the Meeting.
- Schedule monthly phone/email contacts with the Project Leaders for ongoing.
- See companion document “**Executive Review of Improvement Projects: A Primer for CEOs and other Senior Leaders**”