Project Management: Keep Projects Moving Without Chasing People

November 3, 2026 | Operations + Work Systems

Turn messy project updates into a clear view of what needs attention, what could delay the project, and what happens next.

Organize the work. Find what matters most. Make the next step clear.

November 3, 2026
12–1 PM Eastern · 60 minutes
With Cheryl Thompson

Who it is for
Project managers, program leaders, operations leaders, and cross-functional teams.

Bring
One meeting transcript, project update, or issue list and access to your approved AI tool.

Open the online playbook

The recorded session

Watch the Learning Lab.

Follow the November 3 session, then use the prompts and practice scenarios with your own project.

Watch replay on Vimeo ↗ [1]

0–5 minutes · Get ready

A longer action list does not show what matters most.

A manufacturing leader described teams carrying tens of thousands of open issues. The real problem was finding the few items that could delay several other tasks or move the launch date.

Ask one question

If this action is late, what else gets delayed? A task can look urgent without affecting anything else. The work that matters most is the work that other tasks are waiting on.

Bring one meeting transcript, action list, or project update. We will turn it into a clear update, find the five items most likely to delay the project, and build a dashboard you can use in a meeting.

Open your approved AI tool in another tab

Microsoft Copilot ↗ [2]

Claude ↗ [3]

ChatGPT ↗ [4]

Gemini ↗ [5]

1. **Use a fresh chat for each prompt.** This prevents one example from bleeding into the next.
2. **Use approved information.** Anonymize customer, supplier, financial, and employee information when required.
3. **Verify before acting.** The official tracker and the people doing the work remain the source of truth.

Our 60-minute path

1. 0–5 min Why a longer action list does not show what matters [6]
2. 5–10 min Organize, Focus, Act [7]
3. 10–20 min 01 · Turn notes into a clear update [8]
4. 20–32 min 02 · Find what could delay the project [9]
5. 32–46 min 03 · Build the dashboard [10]
6. 46–53 min 04 · Set up follow-up [11]
7. 53–57 min 05 · Explain what changed [12]
8. 57–60 min Choose one move for this week [13]

5–10 minutes · How to find what matters

Organize. Focus. Act.

01

Organize

Separate actions, decisions, risks, roadblocks, and unanswered questions. Keep the source for each fact.

02

Focus

Find the tasks that other work is waiting on, the deadlines that leave little room to recover, and the problems that will be hard to fix later.

03

Act

Show the task order, next decision, owner, and last useful date to step in.

Two project terms, in plain language

- **Critical few:** the small number of items most likely to delay several tasks or the final date.
- **Critical path:** the linked tasks that determine whether the final date moves.

What to check	Question to ask	What it looks like
Other work depends on it	What else will be delayed if this slips?	Several tasks need the same result before they can start.
Time left to act	How long do we have before recovery becomes difficult?	A decision helps today but will be too late next week.
Many people depend on it	How many teams, approvals, or suppliers are waiting on this?	One item affects several teams.
Hard to recover	What will it take to catch up after a miss?	Recovery needs extra cost, scarce capacity, or a customer decision.

Keep this distinction: urgent means something needs attention soon. High impact means other work or the final date will move if it is late.

01 · Organize · 10–20 minutes

Turn meeting notes into a clear project update.

Give the AI a transcript, rough notes, email thread, or task list. It will separate actions, decisions, risks, roadblocks, and unanswered questions.

You'll build: A short project summary, action list, decision list, risk list, and possible trouble spots to review.

Full prompt

Turn Meeting Notes Into a Clear Project Update

PROMPT TO COPY

ROLE
You are a senior project analyst for manufacturing and cross-functional projects. You turn messy meeting transcripts, notes, emails, and task lists into a clear project update. You separate confirmed facts from interpretation and keep decisions, owners, dates, risks, and open questions consistent.

CONTEXT
I will give you raw project information. It may contain repeated updates, incomplete statements, conflicting dates, vague ownership, or conversational language. I need a project update that helps the team act without treating every sentence as equally important.

REQUEST
Before you produce anything, please ask me the questions in the DISCOVERY section below. Ask them all at once, in a single numbered list. Wait for my response. Once I answer, accept whatever I write, even if it's a paragraph or covers multiple questions at once. Do not re-ask the full list. If one detail is missing and you genuinely need it, ask one short follow-up about only that gap. Otherwise, go ahead and produce the output and note any assumptions you made.

Using only the information I provide, create:

1. PROJECT SNAPSHOT
   - Objective, fixed milestone, current overall status, and the most important change since the last update
   - No more than five bullets

2. ACTION REGISTER
   | Action | Owner | Due Date | Status | Dependency | Source Evidence |
   - Keep the action language specific and observable
   - Mark missing owners or dates [CLARIFICATION NEEDED]

3. DECISION LOG
   | Decision | Decided By | Date | What It Changes | Open Condition |
   - Do not turn discussion or a suggestion into a decision

4. RISK AND BLOCKER LOG
   | Item | Type: Risk or Blocker | Evidence | Likely Impact | Current Response | Owner |
   - Label a conclusion [INFERRED] when it is supported but not stated directly

5. POSSIBLE TROUBLE SPOTS
   - Identify up to five items that deserve a closer look because other work depends on them, there is little time to recover, or the final deadline could move
   - Explain why each item could cause a wider delay in one sentence

PROMPT TO COPY

6. OPEN QUESTIONS
   - List only the questions that would change a decision, priority, owner, or date

Do not invent owners, dates, dependencies, costs, decisions, or status. If something is unclear or missing, flag it inline as [CLARIFICATION NEEDED] instead of guessing. Mark supported interpretations [INFERRED]. Keep dates, owners, numbers, part names, and terminology consistent across every output. Use only the context I provide for this task, not earlier chats or connected files, unless I explicitly ask you to use them.

DISCOVERY
1. What project or program is this for, and what outcome must it deliver?
2. What is the fixed milestone or deadline, if there is one?
3. What raw material will you provide: transcript, notes, task list, email thread, or a mix?
4. Which status labels does your team use?
5. Who will use this project update?
6. Are there any facts, names, or financial details that should be anonymized?

Shorter prompt · Quick use

Use this version when you need a smaller prompt. Fill in the bracketed inputs or let the AI ask about anything missing.

Turn Meeting Notes Into a Clear Project Update, shorter version

PROMPT TO COPY

This is a new task. Please ignore any previous conversation context and treat this prompt fresh.

STEP 0 (do this before anything else)
Read the bracketed details below. If any are empty or vague, ask me about them in one numbered list and wait for my response. Don't search for context, don't draft anything, don't pull from prior conversations. Just ask the questions.

STEP 1 (only after I answer Step 0)
Produce the deliverable I'm asking for.

Project and fixed milestone: [PROJECT + DATE]
Raw material: [PASTE TRANSCRIPT, NOTES, EMAILS, OR TASK LIST]
Status labels: [YOUR LABELS]
Audience: [WHO WILL USE THIS]

PROMPT TO COPY

Create a five-bullet project summary, action list, decision list, risk and roadblock list, up to five possible trouble spots, and only the open questions that could change a priority, owner, decision, or date.

Use only what I paste. Do not invent owners, dates, decisions, dependencies, costs, or status. Mark missing facts [CLARIFICATION NEEDED] and supported interpretations [INFERRED]. Keep names, dates, numbers, and terminology consistent.

Need an example? Try this practice scenario.

This is fictional material. Copy the prompt first. When the AI asks for context, paste this scenario.

Practice scenario 1: raw launch meeting notes

EXAMPLE TO COPY

Program: 2027 midsize SUV structural launch at a Tier 1 stamping and assembly plant. SOP is fixed for March 15, 2027, 18 weeks away.

Team status labels: Not Started, In Progress, At Risk, Blocked, Complete.

Raw notes from Monday's launch review:
- B-pillar reinforcement die is two weeks late. Station 4 showed cavitation during tryout. Delta Tooling says the steel allocation from its mill caused the first delay. No revised completion date was committed. The supplier asked to skip run-at-rate to recover time. Quality said no.
- First full trial is planned for Week 10 and requires all 14 production tools. Nine are approved, three are in tryout, and two have not started tryout.
- Door hinge bracket PPAP is due in 10 days. No samples have arrived. Purchasing said the supplier is working on it, but no ship date was provided. This is the third late sample submission from that supplier.
- Rocker panel results show a 0.4 mm profile difference between our CMM and the supplier fixture. Engineering and supplier quality need one measurement method before the next trial. No owner was named in the meeting.
- The customer moved the PPAP review from November 27 to November 20. Program management has not yet told all suppliers.
- Returnable containers for four parts have an eight-week lead time. Packaging specifications are still open. Logistics says the order must be released Friday.
- Paint is at 97% capacity. One extra shift costs about $45,000 per week and does not recover more than one day.
- Decision: run-at-rate will not be waived. The launch director asked for a recovery proposal from Delta Tooling by Wednesday at noon.

EXAMPLE TO COPY

- Open question: if the B-pillar tool misses Week 10, can the trial sequence be split, or does the entire trial move?

Your turn. Check one decision and one action against the source. If the owner, date, or decision is not explicit, keep the clarification flag visible.

02 · Focus · 20–32 minutes

Find the work that could delay the project.

Not every open task deserves the same attention. This step finds the few items that other work depends on, shows how much time you have to act, and explains what could be delayed if one slips.

You'll build: A ranked top-five list, a simple task sequence, a what-if-it-slips check, a watch list, and the one place a leader can help most this week.

Full prompt

Find the Work That Could Delay the Project

PROMPT TO COPY

ROLE
You are a senior project risk and scheduling analyst for manufacturing and cross-functional projects. You help teams find the small number of items most likely to delay other work or move the final date. You look for linked tasks, fixed dates, scarce resources, single points of failure, and the time available to recover.

CONTEXT
My project has more open actions than the team can treat as top priority. I will provide a plan, action list, milestone list, or project update. I need to know which actions can delay the whole project, which items matter but can stay in the normal work queue, and where a leader can help this week.

REQUEST
Before you produce anything, please ask me the questions in the DISCOVERY section below. Ask them all at once, in a single numbered list. Wait for my response. Once I answer, accept whatever I write, even if it's a paragraph or covers multiple questions at once. Do not re-ask the full list. If one detail is missing and you genuinely need it, ask one short follow-up about only that gap. Otherwise, go ahead and produce the output and note any assumptions you made.

Based only on the evidence I provide, produce:

PROMPT TO COPY

1. FIVE ITEMS THAT NEED ATTENTION FIRST
Rank no more than five items using these checks:
- Other work affected: how much work is waiting on this item
- Time left to act: how soon it becomes difficult to recover
- People waiting: how many teams, approvals, or suppliers depend on it
- Difficulty of recovery: how hard or expensive it becomes to catch up after a slip
For each item, show the evidence, the next decision or action, the owner, and the last date when action would still help.

2. TASK SEQUENCE
Show the linked tasks that determine whether the final date moves. This is the critical path. Format it as:
[Task or milestone] -> [Task or milestone] -> [Fixed outcome]
Identify confirmed links, [INFERRED] links, and missing information.

3. WHAT HAPPENS IF EACH ITEM IS LATE
For each of the five items, explain what changes if it slips by 2 days, 1 week, and 2 weeks. Do not calculate dates or costs that the source information does not support.

4. WATCH LIST
List five items that matter but are not currently holding up other work. State what change would move each item into the top five.

5. WHERE A LEADER CAN HELP
Identify the one decision, resource, or issue where a leader's attention would help most this week.

6. CHECK THE RANKING
Name the two assumptions most likely to change the result and the evidence needed to test them.

Do not invent dependencies, float, dates, costs, capacity, owners, or probabilities. If something is unclear or missing, flag it inline as [CLARIFICATION NEEDED] instead of guessing. Mark supported interpretations [INFERRED]. Treat the ranking as a decision aid, not a replacement for the project team's judgment. Keep dates, owners, numbers, and terminology consistent.

DISCOVERY
1. What outcome and fixed milestone define success?
2. What actions, milestones, and open issues should I analyze?
3. Which tasks definitely depend on other tasks, and which links are only suspected?
4. Where is there little or no extra time in the schedule?
5. Which resources, suppliers, approvals, or people are single points of failure?
6. What is the team most worried about right now?

Shorter prompt · Quick use

Use this version when you need a smaller prompt. Fill in the bracketed inputs or let the AI ask about anything missing.

Find the Work That Could Delay the Project, shorter version

PROMPT TO COPY

This is a new task. Please ignore any previous conversation context and treat this prompt fresh.

STEP 0 (do this before anything else)
Read the bracketed details below. If any are empty or vague, ask me about them in one numbered list and wait for my response. Don't search for context, don't draft anything, don't pull from prior conversations. Just ask the questions.

STEP 1 (only after I answer Step 0)
Produce the deliverable I'm asking for.

Outcome and fixed milestone: [OUTCOME + DATE]
Actions, milestones, and open issues: [PASTE]
Confirmed dependencies: [PASTE]
Known single points of failure: [LIST]

Rank no more than five items that need attention first. Check how much other work each item affects, how much time is left to act, how many people are waiting, and how hard it will be to recover. Show the evidence, owner, next move, last useful date to act, linked task sequence, and what changes after a 2-day, 1-week, or 2-week delay. Add a five-item watch list and name the one place a leader can help most this week.

Use only what I provide. Do not invent float, dependencies, dates, costs, owners, or probabilities. Mark missing facts [CLARIFICATION NEEDED] and supported interpretations [INFERRED].

Need an example? Try this practice scenario.

This is fictional material. Copy the prompt first. When the AI asks for context, paste this scenario.

Practice scenario 2: find what could delay the project

EXAMPLE TO COPY

Fixed outcome: 2027 midsize SUV SOP on March 15, 2027. The customer will not move the date. There are 22 open launch actions. The team needs to know which five items could delay the most work.

Confirmed dependencies:
- Full Trial 1 in Week 10 requires all 14 production tools approved and production-intent material available.
- Quality wall setup needs production-representative parts from Full Trial 1.
- Final operator work instructions depend on findings from Full Trial 1.
- Training for 45 operators starts Week 13 and uses the final work instructions.
- Four returnable container designs must be approved before the eight-week container order can be released.

Open items:
1. B-pillar progressive die, two weeks late, Station 4 cavitation unresolved, no revised date. Owner: Delta Tooling with internal tooling engineer Maria Chen.
2. Door hinge bracket PPAP samples, due in 10 days, no ship date. Owner: supplier quality engineer Aaron Bell.
3. Rocker panel measurement mismatch, 0.4 mm difference, next trial in 12 days. Owner not assigned.
4. Packaging specifications for four parts, order release due Friday or containers arrive after SOP. Owner: logistics lead Dana Brooks.
5. Paint capacity recovery option, 97% loaded, one extra shift available at about $45,000 per week. Owner: paint manager Luis Ortiz.
6. Customer PPAP review moved forward seven days. Supplier notification incomplete. Owner: program manager.
7. Weekly dashboard formatting is inconsistent. Owner: PMO analyst. Due next Friday.
8. Steering deck logo is outdated. Owner: communications. Due next month.

Known constraint: Full Trial 1 has only two extra days in the schedule before later tasks move. The tooling engineer and CMM programmer are each single points of failure for their team areas.

Your turn. Challenge the first ranking. Remove one item that is loud but will not delay other work. Add the evidence that would change the top five.

03 · Build · 32–46 minutes

Build an interactive project dashboard.

Turn the same project facts into a dashboard you can click and use in a meeting. The sample below shows what success looks like before you build your own.

You'll build: A working dashboard that shows what needs attention, the order of dependent tasks, risks, decisions, filters, and a simpler meeting view.

What should happen after you paste Prompt 3?

Your AI tool should build a dashboard you can click. The screen and file location will look different in each tool.

- **Microsoft Copilot:** It may open the dashboard in a Copilot Page, or give you a link to an HTML file stored in OneDrive or SharePoint. Both are successful results.
- **Claude:** It may open the dashboard as an Artifact.
- **ChatGPT:** It may open the dashboard in Canvas.
- **Gemini:** It may open the dashboard in Canvas.

Using Microsoft Copilot? You can select **+ > More > Draft page or code** before pasting the prompt. If Copilot gives you a OneDrive or SharePoint link instead, open it. If you can use the filters, select an item, simplify the meeting view, reset, and print, the exercise worked.

If Copilot says the page builder is unavailable: Prompt 3 tells it to create the complete HTML version automatically. If Copilot still stops and displays **Create the complete HTML prototype** , select that option. It is the same dashboard exercise using the backup method.

Do not worry about where Microsoft saved it. You do not need a different prompt for each tool.

Interactive sample

SUV Launch Project Dashboard

Practice version · Last updated November 3, 2026

18

weeks to SOP

4

items needing attention first

2

blocked

3

decisions needed

Yellow

overall status

Tasks that must happen in this order

1. B-pillar die
2. Full Trial 1
3. Quality wall
4. Work instructions
5. Operator training
6. SOP

Team area

All

Tooling

Quality

Logistics

Manufacturing

Program

7 actions shown

Action	Team area	Owner	Due	Status
Priority 1	Tooling	Maria Chen	Wednesday, noon	Blocked
Priority 2	Logistics	Dana Brooks	Friday	Blocked
Priority 3	Quality	Aaron Bell	10 days	At risk
Priority 4	Quality	[CLARIFICATION NEEDED]	Before trial in 12 days	At risk
Watch	Program	Program manager	Today	Open
Watch	Manufacturing	Luis Ortiz	Before recovery decision	Open
Routine	Program	Communications	Next month	Open

Selected item

B-pillar die recovery

Owner

Maria Chen

Due

Wednesday, noon

Status

Blocked

Why it needs attention first
Full Trial 1 needs all 14 production tools approved.

What needs to happen next
Get a complete recovery plan and decide whether to reserve the alternate press slot.

What it can delay
Full Trial 1, quality wall setup, final work instructions, operator training, SOP.

Items most likely to cause trouble

B-pillar die

Containers

Door hinge PPAP

Measurement alignment

Practice version only. Check dates, owners, status, and task order against the official launch tracker.

Full prompt

Build an Interactive Project Dashboard

PROMPT TO COPY

ROLE
You are a product designer and front-end prototyper who builds clear project dashboards for manufacturing and cross-functional teams. You make the few items that need attention easy to see without turning every open item red.

CONTEXT
I will provide a project update and an analysis of the work most likely to cause delays. I want a working, interactive dashboard that a project leader can use in a meeting. It is a practice tool, not the official project tracker. Use the environment where this prompt is running. Do not ask me which AI tool I am using.

REQUEST

PROMPT TO COPY

Review the project material I provide with this prompt. If it answers the DISCOVERY section, proceed directly to the build without repeating those questions. If a required project detail is missing, ask only the missing question or questions in one numbered list, then wait for my response. Do not ask which AI tool I am using.

Complete the build in the same response once you have enough project information. First use the interactive workspace available in the current tool. If the native page, canvas, artifact, or code-preview builder is unavailable, switch immediately to the complete HTML fallback in the INTERACTIVE OUTPUT section. Do not stop after explaining that a tool is unavailable. Do not ask me to choose the fallback, click a suggestion, or send another prompt.

Using the information I provide, build an interactive project dashboard with:

1. PROJECT SUMMARY
   Cards for days to the fixed milestone, items needing attention first, blocked items, decisions needed, and overall project status.

2. ITEMS THAT NEED ATTENTION FIRST
   Show no more than five items. Include owner, due date, status, why it matters, the last date when action would still help, and what it can delay.

3. TASK SEQUENCE
   Show the linked tasks that determine whether the final date moves. Distinguish confirmed links, [INFERRED] links, completed work, current work, and blocked work.

4. RISK VIEW
   Show impact and likelihood only when the source information supports both. Otherwise show Not Rated and explain what is missing.

5. ACTION LIST
   Add filters for team area, owner, status, and Needs Attention First. Let the user select an action to see its evidence, what depends on it, what needs to happen next, and what it can delay.

6. SIMPLIFIED MEETING VIEW
   Add a focused view showing decisions needed today, owners who need support, and items that changed since the last review.

7. SAFETY AND USABILITY
   Add a visible Practice version label, a Last updated field, keyboard-accessible controls, readable contrast, and a reminder to verify dates, owners, and status against the official project tracker.

INTERACTIVE OUTPUT
- Use the first available path without asking me to choose: the tool's native interactive workspace, or the complete HTML fallback.

PROMPT TO COPY

- In Microsoft Copilot, use a code-enabled Copilot Page and Preview mode when that capability is available. Otherwise switch immediately to the HTML fallback.
- In Claude, use an interactive Artifact when available. In ChatGPT or Gemini, use Canvas when available. In another AI tool, use its equivalent interactive workspace when available.
- Build a working interface so I can operate the dashboard, filters, detail views, simplified meeting view, Reset, and Print controls. Do not return only a static description or an embedded chat response when an interactive workspace is available.
- HTML fallback: create one complete, self-contained HTML file with inline CSS and JavaScript. Do not use external libraries, external APIs, tracking, or network calls. If this environment can save a file, save it and provide an openable link. Otherwise return the entire HTML in one code block so it can be saved as an .html file.
- Keep all data in the page. Include a Reset sample data button and a Print meeting view button.
- Never end the response only by saying that the native builder is unavailable. Produce the HTML fallback in that same response.

Do not invent project facts, dates, owners, costs, dependencies, or status. If something is unclear or missing, show [CLARIFICATION NEEDED] in the interface instead of guessing. Keep all labels, dates, owners, and numbers consistent with the source material. Build with fictional or approved project data only.

DISCOVERY
1. What project update and list of items needing attention should populate the dashboard?
2. Which status labels and colors does your team use?
3. Who will view this dashboard during the meeting?
4. Which five numbers or status measures belong in the project summary?
5. What title, brand colors, and last-updated date should appear?

Shorter prompt · Quick use

Use this version when you need a smaller prompt. Fill in the bracketed inputs or let the AI ask about anything missing.

Build an Interactive Project Dashboard, shorter version

PROMPT TO COPY

This is a new task. Please ignore any previous conversation context and treat this prompt fresh.

STEP 0 (do this before anything else)
Read the bracketed details below. If any are empty or vague, ask me about them in one numbered list and wait for my response. Don't search for context, don't draft anything, don't pull from prior conversations. Just ask the questions.

STEP 1 (only after I answer Step 0)
Produce the deliverable I'm asking for.

Project title: [TITLE]
Project update and list of items needing attention: [PASTE]
Status labels and colors: [LIST]
Viewer: [AUDIENCE]

Build an interactive project dashboard with a project summary, top-five view, linked task sequence, risk view, filterable action list, click-for-details panel, and simplified meeting view. Add a Practice version label, Last updated field, Reset sample data, Print meeting view, and a reminder to verify facts against the official project tracker.

Use the first available path without asking me to choose. In Copilot, use a code-enabled Page and Preview mode when available. In Claude, use an Artifact when available. In ChatGPT or Gemini, use Canvas when available. If the native builder is unavailable, do not stop or explain the limitation. Immediately create one complete, self-contained HTML file with inline CSS and JavaScript and no external libraries or network calls. Save it and provide a link when file creation is available; otherwise return the full HTML in one code block. Do not ask me to click a suggestion or send another prompt. Build a working interface so I can operate the dashboard, filters, detail views, simplified meeting view, Reset, and Print controls. Do not invent project data. Show [CLARIFICATION NEEDED] for missing fields.

Need an example? Try this practice scenario.

For the practice run, paste the full prompt and this scenario into the same message. The scenario already supplies the project details.

Practice scenario 3: build the project dashboard

EXAMPLE TO COPY

Dashboard title: SUV Launch Project Dashboard. Last updated: November 3, 2026. Audience: launch team and steering committee. Fixed milestone: SOP March 15, 2027, 18 weeks away.

Use these summary numbers: 22 open actions, 4 items needing attention first, 2 blocked items, 3 decisions needed, overall status Yellow.

Items needing attention first:
1. B-pillar die recovery. Owner Maria Chen. Status Red. Revised supplier date missing. Latest useful intervention: Wednesday noon. Can delay Full Trial 1, quality wall, work instructions, and operator training.
2. Returnable container release. Owner Dana Brooks. Status Red. Due Friday. Missing the order window puts containers after SOP.
3. Door hinge PPAP samples. Owner Aaron Bell. Status Yellow. Due in 10 days. No supplier ship date.
4. Rocker measurement alignment. Owner [CLARIFICATION NEEDED]. Status Yellow. Needed before trial in 12 days. Conflicting measurement methods block disposition.

Confirmed task sequence that controls the final date: B-pillar die approval -> Full Trial 1 -> quality wall setup -> final work instructions -> operator training -> SOP.

Decisions needed today:
- Whether to split Full Trial 1 if the B-pillar die misses Week 10.
- Whether to release returnable containers with one packaging assumption still open.
- Who owns the rocker measurement alignment.

Team areas for filters: Tooling, Quality, Logistics, Manufacturing, Program. Status labels: Green, Yellow, Red, Blocked, Not Rated. Brand colors: navy #1A1A6C, teal #007F83, coral #E86F51, cream #F7F2E8.

Every item needs a details view with evidence, what depends on it, what needs to happen next, and what it can delay. The dashboard must say Practice version and remind users to verify against the official launch tracker.

Your turn. Build with the fictional data first. Select one high-impact item, confirm why it matters and what it can delay, then try one filter before using approved project information.

04 · Follow up · 46–53 minutes

Follow up without chasing everyone.

Set a simple routine for updates, reminders, decisions, and missed commitments. Start with the tools your team already uses, such as Copilot Chat, Outlook, Teams, Excel, or Planner.

You'll build: A simple update schedule, ready-to-use reminder messages, rules for when to raise an issue, a 30-minute meeting plan, and clear follow-up steps for missed commitments.

Full prompt

Set Up Follow-Up Without Chasing People

PROMPT TO COPY

ROLE
You are a senior project follow-up advisor for manufacturing and cross-functional programs. You create simple, practical follow-up plans that protect high-impact work without turning the project manager into a professional reminder service.

CONTEXT
I manage work across people who may not report to me. I need a repeatable plan for updates, reminders before deadlines, decisions, meetings, and missed commitments. The plan must focus attention on work that could delay the project while leaving routine work at the right level.

REQUEST
Before you produce anything, please ask me the questions in the DISCOVERY section below. Ask them all at once, in a single numbered list. Wait for my response. Once I answer, accept whatever I write, even if it's a paragraph or covers multiple questions at once. Do not re-ask the full list. If one detail is missing and you genuinely need it, ask one short follow-up about only that gap. Otherwise, go ahead and produce the output and note any assumptions you made.

Based on the project and team information I provide, create:

1. WEEKLY UPDATE PLAN
| Communication | Purpose | Audience | Owner | Timing | Input Required | Output |
Include the lightest cadence that will keep the project controlled.

2. REMINDERS BEFORE AND AFTER THE DEADLINE
Draft messages for 7 days before, 3 days before, 1 day before, and 1 day late. Use a stronger message only when the item could delay other work.

3. WHEN AN IMPORTANT ITEM CHANGES
Define what happens when an item that could delay other work changes. Include who is notified, what facts are required, when a decision is due, and when the issue should be raised to a leader.

4. IMPROVE THE MEETING
Build a 30-minute project meeting that spends no more than five minutes collecting status. Use the remaining time for decisions, possible delays, tradeoffs, and owner support.

5. WHAT TO DO AFTER A MISSED COMMITMENT

PROMPT TO COPY

Create a factual, respectful sequence from the first check-in to formal escalation. Include what triggers each step and who owns the next move.

6. USE THE TOOLS WE ALREADY HAVE
Show how to run the system with ordinary Copilot Chat, Outlook, Teams, Excel, Planner, or a shared tracker. Suggest automation only as an optional later step. Drafts must be reviewed by a person before they are sent.

Do not invent commitments, authority, owners, dates, escalation rules, or company policy. If something is unclear or missing, flag it inline as [CLARIFICATION NEEDED] instead of guessing. Keep dates, owners, numbers, and terminology consistent. Make every template ready to use after one human review.

DISCOVERY
1. What project, fixed milestone, and high-impact items should this follow-up plan protect?
2. Who owns the work, and who has decision or escalation authority?
3. What update and meeting rhythm exists today?
4. Where does chasing happen most often?
5. Which tools are approved for communication and tracking?
6. What tone should reminders use: Routine, Important, or Sensitive?

Shorter prompt · Quick use

Use this version when you need a smaller prompt. Fill in the bracketed inputs or let the AI ask about anything missing.

Set Up Follow-Up Without Chasing People, shorter version

PROMPT TO COPY

This is a new task. Please ignore any previous conversation context and treat this prompt fresh.

STEP 0 (do this before anything else)
Read the bracketed details below. If any are empty or vague, ask me about them in one numbered list and wait for my response. Don't search for context, don't draft anything, don't pull from prior conversations. Just ask the questions.

STEP 1 (only after I answer Step 0)
Produce the deliverable I'm asking for.

Project, milestone, and critical items: [PASTE]

PROMPT TO COPY

Owners and decision authority: [LIST]
Current rhythm and biggest chasing problem: [DESCRIBE]
Approved tools: [COPILOT / OUTLOOK / TEAMS / EXCEL / PLANNER / OTHER]
Tone: [ROUTINE / IMPORTANT / SENSITIVE]

Create the simplest weekly update plan that protects work most likely to delay the project. Include reminder messages for 7 days before, 3 days before, 1 day before, and 1 day late; rules for handling an important change; a 30-minute decision-focused meeting; and clear steps after a missed commitment. Show how to run it manually first. Human review is required before any message is sent.

Do not invent policy, authority, commitments, owners, or dates. Mark missing facts [CLARIFICATION NEEDED].

Need an example? Try this practice scenario.

This is fictional material. Copy the prompt first. When the AI asks for context, paste this scenario.

Practice scenario 4: replace chasing with a rhythm

EXAMPLE TO COPY

I manage the same SUV launch with eight workstream leads across tooling, quality, manufacturing, logistics, purchasing, engineering, HR, and finance. None report to me. Functional directors own their priorities; the launch director and steering committee own escalation decisions.

Current rhythm: I send a status request Monday morning and ask for replies by Wednesday. Three leads reply on time, two reply Thursday or Friday, two respond after individual follow-up, and purchasing rarely replies without a call. Our weekly launch meeting lasts 60 minutes. About 30 minutes is spent going around the table collecting status that could have been submitted earlier. The rest is reactive problem-solving.

What is failing: routine actions and items that could delay other work receive the same reminder. People do not see which late item will affect several other tasks. When I copy directors, response improves for one week and then returns to the old pattern. I do not want to burn political capital by escalating every missed update.

What must be protected this month: B-pillar die recovery by Wednesday noon, returnable container release by Friday, door hinge PPAP samples within 10 days, and rocker measurement alignment before the next trial in 12 days.

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Approved tools: Microsoft 365 Copilot Chat, Outlook, Teams, Excel, and Planner. We do not have Copilot Cowork. Drafts must be reviewed before sending. Tone should be Routine for normal status, Important for work that could delay the project and needs action soon, and Sensitive for a customer commitment or formal escalation.

I need a simpler weekly update plan, rules for handling important changes, messages before deadlines, a 30-minute meeting agenda, and clear steps after a missed commitment.

Your turn. Choose one important commitment. Write the next check-in, when the issue should be raised, and who can make the needed decision.

05 · Explain · 53–57 minutes

Tell each person what changed and what you need.

Turn the same verified facts into a short leader brief, a message to the person doing the work, a team update, and an escalation only when one is truly needed.

You'll build: Five consistent messages based on the same facts, with the right amount of detail for each audience.

Full prompt

Explain What Changed and What You Need

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ROLE
You are a senior project communication advisor for manufacturing and cross-functional programs. You turn one set of verified project facts into the right message for each audience.

CONTEXT
I need to communicate a project change, serious risk, or decision without burying the headline, overstating certainty, or blaming a person. I will provide the verified facts, the likely effect on other work, and the audiences.

REQUEST
Before you produce anything, please ask me the questions in the DISCOVERY section below. Ask them all at once, in a single numbered list. Wait for my response. Once I answer, accept whatever I write, even if it's a paragraph or covers multiple questions at once. Do not re-ask the full list. If one detail is missing and you genuinely need it, ask one

PROMPT TO COPY

short follow-up about only that gap. Otherwise, go ahead and produce the output and note any assumptions you made.

Using the information I provide, create:

1. LEADER DECISION BRIEF
   - Headline in 12 words or fewer
   - Current status and what changed
   - Business or launch impact
   - Decision needed, options, recommendation, and decision deadline
   - Under 200 words

2. MESSAGE TO THE PERSON DOING THE WORK
   - The specific commitment, dependency, or support needed
   - Why the timing matters
   - One clear response requested by a stated date
   - Under 150 words

3. TEAM UPDATE
   - What changed, what stays the same, the items that need attention first, and next actions with owners and dates
   - Under 250 words

4. ESCALATION EMAIL, ONLY IF WARRANTED
   - Facts, prior actions, current impact, decision or support requested, and deadline
   - Focus on the issue and recovery path, not the person

5. 60-SECOND MEETING OPENING
   - A 60-second spoken update that starts with the decision or critical-path threat

Use the requested tone selector:
- Routine: normal coordination, no immediate threat
- Important means action is needed soon to protect the plan
- Sensitive: relationships, customer commitments, cost, or leadership attention require extra care

Do not invent facts, commitments, costs, customer positions, authority, or dates. If something is unclear or missing, flag it inline as [CLARIFICATION NEEDED] instead of guessing. Keep dates, owners, numbers, and terminology consistent across every version. If escalation is not warranted, say so and provide the next proportionate step.

DISCOVERY
1. What changed, and what evidence confirms it?
2. What can this affect if no action is taken?
3. What decision, commitment, or support is needed, from whom, and by when?
4. What has already been tried?
5. Who are the executive, functional, and team audiences?

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6. Which tone fits: Routine, Important, or Sensitive?

Shorter prompt · Quick use

Use this version when you need a smaller prompt. Fill in the bracketed inputs or let the AI ask about anything missing.

Explain What Changed and What You Need, shorter version

PROMPT TO COPY

This is a new task. Please ignore any previous conversation context and treat this prompt fresh.

STEP 0 (do this before anything else)
Read the bracketed details below. If any are empty or vague, ask me about them in one numbered list and wait for my response. Don't search for context, don't draft anything, don't pull from prior conversations. Just ask the questions.

STEP 1 (only after I answer Step 0)
Produce the deliverable I'm asking for.

Verified change and evidence: [PASTE]
Impact if no action is taken: [DESCRIBE]
Decision or support needed, from whom, by when: [DESCRIBE]
What has already been tried: [LIST]
Audiences: [EXECUTIVE / FUNCTIONAL OWNER / TEAM]
Tone: [ROUTINE / IMPORTANT / SENSITIVE]

Create an executive decision brief, functional owner message, team update, escalation email only if warranted, and a 60-second meeting opening. Start each version with what the audience needs to know or do. Keep facts, dates, owners, and numbers consistent.

Do not invent commitments, costs, customer positions, authority, or dates. Mark missing facts [CLARIFICATION NEEDED]. If escalation is not warranted, give the next proportionate step.

Need an example? Try this practice scenario.

This is fictional material. Copy the prompt first. When the AI asks for context, paste this scenario.

Practice scenario 5: translate one critical change

EXAMPLE TO COPY

Verified change: Delta Tooling confirmed at 9:15 AM that the B-pillar progressive die will miss its revised completion date by another five business days. Station 4 still shows cavitation after the second tryout. Delta has not requested a third tryout date from the press shop. Maria Chen confirmed the update in the supplier call notes.

Fixed outcome: Full Trial 1 is scheduled for Week 10 with only two days of float. It requires all 14 tools approved. Quality wall setup, final operator work instructions, and training for 45 operators depend on production-representative parts from the trial. SOP remains fixed for March 15, 2027.

What has been tried: the team rejected Delta's request to skip run-at-rate. Maria requested a written recovery plan twice. The launch director set Wednesday noon as the deadline. Delta sent a partial plan with weekend work but no confirmed press time or completion date.

Decision needed: by 3 PM today, the launch director must choose whether to reserve an alternate press slot at an estimated $18,000, split Full Trial 1 around the B-pillar parts, or keep the current plan and accept the schedule risk. Engineering must confirm whether a split trial will produce enough representative parts for quality wall setup.

Audiences:
- Executive: plant manager and VP of operations. They need launch risk, cost exposure, options, and a recommendation.
- Functional owner: engineering director. She needs a decision on the split-trial feasibility and an owner by noon.
- Team: eight workstream leads. They need to know what changed, what remains fixed, and which downstream dates are now conditional.

Tone: Sensitive. Keep the message factual and recovery-focused. Do not blame the supplier contact.

Your turn. Read the executive version first. Can the leader see the decision, options, recommendation, and deadline without searching for them?

Before you use the output

Check the work before you share it.

- **Check the information you gave the AI.** Confirm the notes, dates, owners, and decisions are accurate.
- **Read what it produced.** Do not forward an update you do not understand. Fix small errors before they become project facts.

- **Check the task order.** The people doing the work must confirm which tasks truly depend on one another and how much time the team has to recover.
- **Protect sensitive information.** Use your approved company tool and follow access, confidentiality, and data-handling rules.
- **Keep a person responsible for every decision.** AI can organize, rank, draft, and visualize. Your team still owns the decisions and commitments.

57–60 minutes · Put it into practice

Make one project move this week.

1. **Organize one real meeting.** Run Prompt 1 and verify the decisions, actions, owners, and dates.
2. **Find what could cause a delay.** Run Prompt 2 and ask the team what evidence would change the top five.
3. **Build the dashboard.** Use fictional or approved data. Show the tasks that affect other work and the decisions needed now.
4. **Improve one meeting.** Collect routine updates before the call. Use meeting time for decisions and problem solving.
5. **Measure one result.** Track time saved, earlier risk detection, or fewer late surprises.

What we did not cover

- Connecting the prototype directly to an ERP, project portfolio system, or data lake.
- Automated sending, autonomous escalation, or decisions without human review.
- Replacing the official project tracker or change-control process.
- Company-specific access, security, retention, or AI governance requirements.

The goal is not a fancier dashboard. It is helping the team see the few actions that can delay the project while there is still time to do something about them.

Questions or feedback? cheryl@cherylthompson.net [14]

Links and resources

These links are clickable in the PDF. For a paper copy, use the numbered references below.

[1] https://vimeo.com/1242957458/73c3ea005c?share=copy&fl=sv&fe=ci

[2] https://copilot.microsoft.com/

[3] https://claude.ai/

[4] https://chatgpt.com/

[5] https://gemini.google.com/

[6] https://www.cherylthompson.net/learning-labs/2026-11-03-project-management-keep-projects-moving-without-chasing-people#start

[7] https://www.cherylthompson.net/learning-labs/2026-11-03-project-management-keep-projects-moving-without-chasing-people#framework

[8] https://www.cherylthompson.net/learning-labs/2026-11-03-project-management-keep-projects-moving-without-chasing-people#capture

[9] https://www.cherylthompson.net/learning-labs/2026-11-03-project-management-keep-projects-moving-without-chasing-people#prioritize

[10] https://www.cherylthompson.net/learning-labs/2026-11-03-project-management-keep-projects-moving-without-chasing-people#build

[11] https://www.cherylthompson.net/learning-labs/2026-11-03-project-management-keep-projects-moving-without-chasing-people#move

[12] https://www.cherylthompson.net/learning-labs/2026-11-03-project-management-keep-projects-moving-without-chasing-people#communicate

[13] https://www.cherylthompson.net/learning-labs/2026-11-03-project-management-keep-projects-moving-without-chasing-people#next-step

[14] mailto:cheryl@cherylthompson.net