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AI / BUSINESS GROWTH / CHECKLIST

Project Planning for Sustainable Focus — Practical Checklist

A standalone project-start and weekly-review checklist for UK SME teams to clarify scope, priorities, working conditions, support and role clarity without using personal routines as health or performance assessment.



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Chapter links and PDF bookmarks support navigation. Writing areas are for handwritten or separate notes, not interactive PDF forms.

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A project-start and weekly-review routine for UK SME teams

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Use this checklist to make work more workable

Use this checklist yourself or with a project team to clarify scope, priorities, conditions, support and review.

Use only the prompts that fit. A checklist cannot solve an unreasonable workload, unclear role or missing resources; raise those work-design issues with the people who can change them.

Keep reflection private. This is not a mental-health, fitness-for-work or performance assessment. Do not ask for journals, wellbeing scores, health information or personal explanations. The ICO describes workers' health information as special category data with extra rules; this checklist works without collecting it. [3](#)

HSE's Management Standards identify six areas of work design: demands, control, support, relationships, role and change. They are a useful prompt for a project conversation, rather than a scorecard for individuals.[1](#) This is general educational guidance, not clinical certification or an individual assessment.

1. Project start: agree what is workable

A. Name the work and its boundaries

☐ Project or piece of work:

☐ Purpose in plain words:

☐ The useful outcome or decision by the next review date:

☐ What is in scope now:

☐ **What is deliberately not in scope, deferred, or needs a separate decision:**

☐ **The person who can make a priority or scope decision is:**

☐ The next review date is:

If the brief grows, ask to reduce scope, move the date, add resource or agree what will not be done. A personal focus routine is not a substitute for that decision.

B. Make the first steps visible

☐ Next small, observable action:

☐ What must happen before it can start:

☐ **Who needs to decide, provide information or approve something:**

☐ A sensible handover or stopping point:

☐ **One place to keep the current plan, links and decisions:**

Choose a focus length that suits the task and circumstances: a few minutes between customer calls, a longer period, or several short returns. There is no universal block length or “natural” schedule.

2. Set up conditions you can influence

C. Workspace and access

☐ I will use the most workable available setting: desk, shared space, customer site, workshop, home, or a mobile setup.

☐ I have made one practical adjustment, if useful: notes ready, required tools nearby, a quieter spot, headphones, screen settings, an accessible format, seating, lighting, or a clear handover.

☐ If I cannot change the setting, I will name the constraint and ask for a workable adjustment or plan around it.

Notes:

D. Communication and interruption boundaries

☐ I have agreed the channel for genuinely urgent questions:

☐ I have set a realistic time to check messages, where my role allows:

☐ I have told relevant people when I can respond or when I need a handover:

☐ I have decided what can wait rather than treating every notification as urgent.

A boundary might be a status message, shared task list, protected customer-facing period or handover note. Use the boundary that is available; do not try to create an unavailable one.

E. Optional pause before a task or transition

If a brief pause feels useful, choose one option. It is not required and it is not a test of attention.

☐ Look away from the screen or task and notice one neutral thing in the room.

☐ Take an ordinary, comfortable breath or simply sit quietly for a moment. Stop if this is uncomfortable or brings up distress.

☐ Stand, change position, get water, take a short ordinary walk where safe, or move to the next practical step.

☐ Read the next task aloud, write it down, or ask a colleague to clarify it.

3. Team and employer check: change the work, not the person

For a shared project, discuss the conditions below without asking for personal health information. Record project decisions, owners and dates — not individual wellbeing data.

Work-design prompt	Project action, owner and date
Demands: Are workload, deadlines, work patterns and the environment workable?	_____
Control: What decisions can people make about sequencing or methods?	_____
Support: What resource, cover, training, equipment or manager input is needed?	_____

Work-design prompt	Project action, owner and date
Relationships: What working agreements will reduce avoidable conflict or confusion?	_____
Role: Are responsibilities, decision rights and handovers clear?	_____
Change: What is changing, who needs to know, and when will the plan be revisited?	_____

HSE says employers have a legal duty to protect workers from stress at work by carrying out a risk assessment and acting on it.² Acas advises employers to work with employees to identify risks, agree steps, make changes and review the plan.⁴ This checklist can prompt a project conversation; it does not replace an employer's wider risk-assessment process.

Illustrative SME example: A small design-and-installation business is preparing a client launch while two colleagues are on different shift patterns. The project lead records the single launch decision needed this week, makes the client update the agreed urgent channel, assigns a named handover for site questions, and asks the director to decide whether a lower-priority internal task will move. The team does not ask anyone to explain their health, caring responsibilities or private routines.

4. Weekly review: learn from the work

Set aside a short review at the end of a week, shift cycle or project stage. The aim is to update the plan, not to judge effort or measure wellbeing.

☐ What moved forward or was completed?

☐ What made the work harder: scope, timing, dependency, tools, information, approvals, staffing, environment or something else?

☐ What can I or the team change next: priority, sequence, boundary, handover, support or scope?

☐ What needs a manager, client or project sponsor decision?

☐ What can be stopped, simplified, deferred or delegated?

☐ What will I retain because it was practical for this project?

Capacity-aware alternatives

Use a smaller version when capacity or control is limited. If you are on a shift, caring for someone, managing a disability, working with pain, sharing space, using assistive technology or dealing with frequent changes, choose the least burdensome next step:

- write one next action and one handover point;
- ask for the priority in writing;
- use a short accessible check-in instead of a meeting;
- plan around fixed duties rather than pretending they can move; or
- raise a scope, staffing, access or deadline issue early.

Needing a smaller plan is information about the work and circumstances, not a personal failure.

Final action plan

One project decision or conversation I will request:

One task I will start, continue or hand over next:

One working condition or boundary I will make clearer:

Person responsible / person to speak with:

Date or review point:

What I will do if this plan is not workable:

References

1. [HSE — What are the Management Standards?](https://www.hse.gov.uk/stress/standards/overview.htm)
<https://www.hse.gov.uk/stress/standards/overview.htm>
2. [HSE — Work-related stress and how to manage it](https://www.hse.gov.uk/stress/risk-assessment.htm)
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3. [ICO — Data protection and workers' health information](https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/employment/information-about-workers-health/data-protection-and-workers-health-information/)
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4. [Acas — Risk assessments: Managing work-related stress](https://www.acas.org.uk/managing-work-related-stress/risk-assessments)
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