

The logo consists of the text '150' stacked above 'CLD' in a bold, sans-serif font. The text is white and is contained within a white rectangular shape that has a folded top edge, resembling a document or a folder.

**150  
CLD**

The background of the entire page is a solid orange color. Overlaid on this background are the silhouettes of three construction workers wearing hard hats and safety vests. One worker in the center is gesturing with their right hand raised. The silhouettes are dark and semi-transparent, allowing the orange background to show through.

# **5 STEPS TO KEEP PROJECTS ON TRACK — NO MATTER WHAT**

**A PRACTICAL WORKBOOK**

# Introduction

Projects in construction and infrastructure often go off course not because of poor execution, but because of poor alignment and unclear expectations. Missed deadlines, scope creep and last-minute decisions are often symptoms of a deeper issue: a lack of shared clarity about what success looks like.

The Project Alignment Workbook introduces a structured thinking model to support effective decision-making, cross-functional collaboration, and forward-looking planning. Built around five core leadership questions, this framework helps project directors, senior leaders, and managers avoid assumptions, surface risks early and build alignment before action.

It uses a structured 'What? So What? Now What?' approach to create clarity under pressure. Each section includes prompts, planning tables and team application space.

## You can use this workbook

- In strategic reviews and planning resets
- As part of leadership sessions or cross-disciplinary coordination
- In preparation for mobilisation or delivery recovery
- As a tool to improve structured thinking across teams

## What You'll Walk Away With

By working through this framework, you will:

- Clarify what success looks like across stakeholder levels
- Validate current conditions and reduce planning assumptions
- Identify practical delivery options and their constraints
- Select a delivery route based on risk, resource and impact
- Create a structured, trackable plan that your team can align around

## Understanding the 'What? So What? Now What?' Method

This decision-making method is used across sectors where clarity under pressure is essential. It helps teams break down complex realities into manageable components:

- **What?** – The fact, change or observation (e.g. a design delay, weather change, new instruction)
- **So What?** – The implication (e.g. time impact, quality risk, team or resource exposure)
- **Now What?** – The required action, clarification or mitigation (e.g. escalate, re-sequence, brief)

This method underpins each of the five leadership questions in the workbook.

At each stage, this process helps uncover:

- Tasks to complete
- Threats to address
- Opportunities to capture
- Constraints to navigate
- Questions that still need answers
- Assumptions being made

# Before You Begin...

This workbook is designed for use in ongoing projects. Complete the fields below to make it yours and link it to your current project.

**Project Name**

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**Phase (e.g. planning, delivery, reset)**

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**Date of Session**

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**Facilitator**

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# Q1: What is the current situation, and how does it affect you?

This section applies to:

Project / Workstream:

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Review Date:

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## Why this matters?

Assumptions left untested are the leading cause of delivery failure. This question prompts a current-state assessment: what has changed, what remains unclear, and where key risks are emerging.

## Ask yourself and your team:

- What's happening on site at the moment?
- What's changed since the last review?
- What are the external risks? (weather, delays, design changes?)
- What does the contract or specification say?
- Where are we with design, access and stakeholder dependencies?

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## What to do

- Run informal check-ins with section heads.
- Walk the site. What looks off?
- Review updated risks with your planner, look at PESTLE factors

Ask: "If a new team member joined today, what would we need to tell them to get them up to speed?"

## Working Section

**What?**

(Observation or Fact)

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**So What?**

(Why does this matter?)

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**So What?**

(Task, RFI, Risk, Action)

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## Team Notes / Actions Agreed

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## Q2: What have I been asked to deliver, and why?

This section applies to:

Project / Workstream:

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Review Date:

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### *Why this matters?*

Success cannot be delivered if it isn't clearly defined. Leaders need to clarify what success looks like across client, business and team perspectives to prevent misalignment.

### Consider these:

- What are the client's strategic drivers?
- What are the company's delivery outcomes?
- How will success be measured? (safety, quality environment, time, money, and reputation)
- Where is there potential misalignment?

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### What to do

- Create a 'Success Snapshot' board on-site and reference it in inductions
- Run a 15-minute toolbox talk where each team defines what success looks like in their workstream
- Capture success definitions for client, company, and team – side by side
- Identify and escalate any misalignments

# Working Section

**What?**

(Observation or Fact)

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**So What?**

(Why does this matter?)

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**So What?**

(Task, RFI, Risk, Action)

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## Team Notes / Actions Agreed

With success clearly defined, we can now turn to the options. What must we do to be successful?

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# Q3: What are your options for success?

This section applies to:

Project / Workstream:

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Review Date:

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## Why this matters?

Plans often go off track not because of poor execution, but because leaders jump to solutions without first exploring alternatives. This question helps surface viable routes, flag constraints early, and involve the right people before making delivery commitments.

## Consider these:

- What are the viable routes to achieve the agreed outcome?
- Are we assuming a sequence without validating it?
- Do we have the right people, plant, access and approvals?
- Which constraints are negotiable, and which are fixed?

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A digital engineer proposed resequencing M&E installs after discovering a conflict in BIM. Saved £40k in rework. Nobody asked his view until Q3 was used in a review meeting.

— Case study insight



# What to do

- Run a short session to identify at least three viable delivery routes
- Map out resource, access, and sequencing needs for each route
- Use sticky notes or a shared whiteboard to visualise dependencies
- Involve cross-functional input early, including digital, commercial, and subcontractor reps
- Flag options that require information, permits, or approvals to unlock

## Working Section

**What?**

(Observation or Fact)

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**So What?**

(Why does this matter?)

---

**So What?**

(Task, RFI, Risk, Action)

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## Team Notes / Actions Agreed

Once the must-dos are clear, it's time to decide how to get them done.

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# Q4: Which option will deliver the best results?

This section applies to:

Project / Workstream:

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Review Date:

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## Why this matters?

Choosing a route goes beyond just feasibility; it's also about understanding the clarity, weighing the trade-offs, and ensuring everything aligns beautifully without a shared view of what's best and why, teams drift into action without confidence or coordination. This question helps translate intent into a deliverable plan.

## Consider these:

- Based on what we know, which route is most realistic and achievable?
- What are the key trade-offs, and are they acceptable?
- What risks remain, and how will we manage or mitigate them?
- What input, approvals or decisions are still required?
- How does each option score against safety, quality environment, time, money, and reputation

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## What to do

- Assess your options using your success criteria: safety, quality environment, time, money, and reputation
- Use a 'What If' session to surface risks and invite challenge
- Combine the best elements of viable options, if needed
- Assign ownership to clarify who will lead each part of the agreed plan
- Document assumptions, trade-offs, and required approvals

*Pro tip: Encourage team members to voice the worst-case scenario, then plan backwards.*

## Working Section

**What?**

(Observation or Fact)

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**So What?**

(Why does this matter?)

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**So What?**

(Task, RFI, Risk, Action)

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## Team Notes / Actions Agreed

You've picked your path. Now, make sure nothing gets in your way and identify what could accelerate your success.

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# Q5: How do I know we are on track to be successful?

This section applies to:

Project / Workstream:

Review Date:

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## Why this matters?

Projects succeed or stall based on how quickly blockers are surfaced and progress is tracked. This question builds feedback loops, clarity of ownership, and measurable delivery confidence.

## Consider these:

- What's slowing us down, and what can we do about it?
- What can we remove, simplify or combine?
- What progress measures already exist, and are they being used?
- Are we capturing lessons or input from those doing the work?
- What is the data and model telling us?

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### True story

On a housing project, rework was repeatedly caused by unclear scope handovers. Once we asked the foremen what they needed before starting work, it stopped.



# What to do

- Define progress measures and handover criteria early
- Use visual trackers and weekly reviews to monitor progress
- Run a Risk & Opportunity Table to surface blockers and enablers
- Assign clear ownership for tracking and action

## Working Section

### What?

(Observation or Fact)

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### So What?

(Why does this matter?)

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### So What?

(Task, RFI, Risk, Action)

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## Team Notes / Actions Agreed

You've got a plan. Now let's make sure it stays on track.

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# Using This Framework With Your Team

This workbook is used in

- planning resets,
- leadership development,
- and delivery recovery across civils and infrastructure projects.

If you'd like support using it with your team, training a workstream lead, or embedding it across projects, get in touch.

## **Bring Site Clarity to Your Projects**

→ Book a [short call with Colin](#)

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