

● ESTEBAN ALMEIDA

P R O J E C T M A N A G E R

FROM IDEA TO CLOSE

The five phases to articulate a project from start to finish.

Someone has the idea. Someone designs it. Someone produces it. And someone makes sure all of that arrives together, on time and complete.

That's me. I make sure the project makes it from idea to close, complete.

This is the system I use to run a project (a campaign, a venue, or an event) from idea to consolidation: 26 control points spread across five phases.

It's not textbook theory. It's what I learned coordinating teams between the Americas and the Middle East for a media organization with 300 million in reach, managing 20 simultaneous accounts as the sole PM at an agency, producing 400+ shows, and building businesses from scratch.

Use it as a checklist. Where you can't check a box, that's your next task.

E S T E B A N A L M E I D A

PHASE 01 **CONCEPT** *before the brief*

- ☐ Define the business objective in a single sentence
- ☐ Identify the stakeholder (who decides and approves) and the end audience you're speaking to, which isn't always the same person
- ☐ Validate that the solution answers a real problem and that the numbers support it
- ☐ Define scope: what's in and, above all, what is NOT in
What isn't written down as out of scope ends up getting done for free.
- ☐ Define success KPIs (key performance indicators) from day one
If you define them at the end, you'll always find a number that proves you right.

PHASE 02 **ARTICULATION** *the dimensions no one should forget*

- ☐ Team: roles, owners, and workload by function (creative, production, technical, commercial)
- ☐ Budget: costs, margins, and estimated hours per deliverable
The project isn't lost in the total budget, it's lost in the hours nobody counted.
- ☐ Legal/contractual: signed scope, intellectual property, terms
- ☐ Vendors/partners: stack (the set of tools and services you depend on), specialized allies, and backups for every critical one
A critical vendor without a backup plan isn't a vendor: it's a single point of failure.
- ☐ Delivery standard: what gets delivered, at what quality level, and who approves it

PHASE 03 **PRE-PRODUCTION** *80% of success is decided here*

- ☐ Timeline with milestones, partial deliveries, and real deadlines
- ☐ Dependency map: what task blocks which other one
- ☐ Risk matrix: what can fail and its mitigation plan
- ☐ Definition of “done”: acceptance criteria per deliverable
Without a written acceptance criteria, “done” is an opinion, and the reviewer's opinion always wins.
- ☐ Approval flow: who reviews and who signs off at each stage
Projects rarely fall behind producing. They fall behind waiting on approvals nobody assigned.

PHASE 04 EXECUTION *when the project goes live*

- ☐ A single person responsible for coordination and project status
When everyone coordinates, no one coordinates. From idea to close, there's a single owner.
 - ☐ Defined communication channel and cadence (short daily check-in, weekly report, closing point)
 - ☐ Centralized version control and feedback (nothing scattered across chats)
 - ☐ Change management: how an out-of-scope adjustment gets approved and quoted
A change without a process isn't a change: it's a gift with your signature on it.
 - ☐ Priority across fronts: what gets handled first when everything is urgent
With several projects running in parallel, you don't manage time: you manage order.
 - ☐ Traffic-light status report (green/yellow/red) for the decision-maker
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PHASE 05 CONSOLIDATION *close and capitalize*

- ☐ Administrative close: invoicing, settlements, vendor feedback
- ☐ Measuring results against the Phase 1 KPIs
Measure against what you defined at the start, not against what turned out well.
- ☐ Retrospective: what to repeat, what to fix
- ☐ Documenting reusable processes and templates
A well-done project that left no template only happened once.
- ☐ Defining the next step: renewal, expanded scope, or close

If there are a lot of unchecked boxes

It's not a bad sign. It's a diagnosis.

No project checks all 26 from the start; the ones that turn out well are the ones that know which are missing and in what order to tackle them. That order is the difference between a project that's articulated and one that's firefighting.

That's what taking it from idea to close means.

If you want me to look at your case: tell me what phase you're in and what's missing. I'll review it personally.

TELL ME WHAT PHASE YOU'RE IN

ESTEBANALMEIDA.PRO/YOUR-PROJECT