

Monthly project deep-dive review

Template and operating guide for Product Delivery Team (PDT) project deep-dive reviews

Owner: [Program direction] and [Executive sponsor] | Version: Template v1 | July 2026

1. Purpose

The monthly deep-dive is a working session that shows the real status of each program: where every key milestone stands, what decisions the team has made, what they are doing to pull in, and where they need help. Schedules, dates, and trends come from live data, and the session runs on the work already going into the PDT process. No slides are built for this meeting.

This is not a performance review. It is an early warning system and a setting to ask for help. We want to know about a problem before it becomes a crisis. Asking for help early is the behavior this forum exists to reward.

2. Objectives

- **Report milestone execution status.** Summarize each project's key milestones as completed, pulled in, on track, late, or slipping; show the trend; and state what the team is doing to recover.
- **Communicate critical decisions.** Decisions made within the latitude of the freedom scale are communicated, not submitted for permission.
- **Surface real problems and ask for help.** Show the gap to target and name the specific support needed to pull in or prevent a slip while there is still time to act.
- **Show the delta since the last review.** Positive, negative, or flat, and why.
- **Be ready to drill down.** For every late or slipping milestone, show the critical path, the gap, the wiggle chart trend, and the recovery actions on demand.

3. Entry criteria

The session only works if three conditions are met before the meeting. If any is not met for a given project, that project defers to the next cycle.

1. **Schedules are current.** Each PM's schedule is updated to the last refresh and reflects present reality as best as the team can state it.
2. **PM and product boss are pre-aligned.** A pre-meeting alignment has taken place, and both arrive on the same page on the schedule and its latest status. A surprise between PM and product boss in the room means this criterion failed.
3. **Critical path analysis is drill-down ready.** The fastProject critical path analysis is complete, with actions in flight on the top 5 critical paths and the material on standby.

4. Review structure

Six content blocks per project, sourced from existing PDT artifacts. Blocks 1 and 2 appear in the first review, then only when something changes; otherwise the session opens directly at block 3.

#	Block	Content	Source / cadence
1	Development flow	Calibrate everyone on the recent development flow changes. First review only; thereafter only if the flow changes.	Existing development flow chart
2	Schedule assumptions	Scope, sample, and safe launch assumptions plus schedule buffers, stated up front to clear the obvious clarifying questions before the schedule.	PM-maintained, one page
3	PDT project summary	10,000-foot view of the project. Product bosses tune the mock-up format to their needs.	Mock-up format, product boss owned
4	Portfolio trends summary	Trend view across the portfolio on the standardized milestone set.	AI-generated weekly
5	Wiggle chart summary	Per-project wiggle chart on the converged common milestone set: samples, qual, release.	AI-generated weekly
6	Key issues and help needed	The real problems, the specific asks, and who is needed to act.	PM and product boss

On standby for drill-down: live schedules, the portfolio dashboard, and the critical path analysis. These are opened on demand, not presented by default.

5. Program status summary

Each program opens with a milestone table populated from the wigglechart dashboard, one row per major milestone, followed by decisions communicated and critical path blockers.

Column	What it shows
Target milestone	The standardized milestone name.
Target date / Predicted finish	Commit date and current forecast from the live schedule.
Schedule gap	Days between target and forecast. Negative means late.
Risk	RAG status.
Change since last update	Movement since the prior refresh, with direction.
Trend	The milestone's wiggle sparkline, pasted from the dashboard.
Cause of change	What moved the date, in one line.
Actions	What the team is doing about it: owner and due date.

Decisions communicated lists each decision made within the PDT freedom scale, its rationale, its freedom scale level, and its effective date. **Critical path blockers** lists CP1 through CP3 with the top issue, actions taken, and the help needed. Fill-in templates for both are in the appendix.

6. PM drill-down standard

When a milestone is late, or on request, the PM drills down from the live schedule. Each PM already runs this analysis weekly with their core team, so no preparation should be needed; rehearsing for the first session is sensible.

1. **Critical path to each standardized target.** What is driving the finish date and the gap?
2. **Peel back to CP2–CP4.** What should we be worried about next?
3. **CP trend analysis.** What should we be worried about next, based on how CP2 and beyond are trending?
4. **Learning cycles.** How many learning cycles does the team realistically expect to need to solve the outstanding technical problems? This is the realistic schedule.

7. Roles

Role	Responsibility
Product bosses	Present. Own blocks 3 and 6; tune the project summary format to their needs.
PMs	Jump in to add color; own the drill-down from live schedules and CP analysis; keep schedules and assumptions current.
Program direction	Set the working-session expectation with the leadership team; hold the format; keep the session on real problems, not polish.
Leadership team	Receive decisions as communication; respond to help-needed items with timely support.

Appendix: fill-in templates

These tables are populated from the weekly PDT artifacts, not built by hand.

A. Milestone status summary (per project)

Milestone	Status	Trend	Commit / forecast	What the team is doing about it
Samples				
Qual				
Release				
[Project-specific]				

B. Decisions communicated (within PDT freedom scale)

Decision	Rationale	Freedom scale level	Effective date

C. Key issues and help needed

Issue / gap	Impact if unresolved	Help needed from	Needed by

D. Drill-down readiness checklist (per PM, pre-meeting)

- Schedule updated to last refresh and reflecting present reality
- Pre-alignment with product boss complete; same page on schedule and latest status
- fastProject CP analysis run; actions in flight on top 5 critical paths
- CP2–CP4 peel-back and trend view ready
- Learning cycle estimate stated for each outstanding technical problem
- Wiggle chart current on the common milestone set (samples, qual, release)

This procedure document will be refined after the first round of deep-dives, based on any changes made on the fly. Documenting the process keeps it repeatable and gives us a base to improve from.