

# ✓ CHECKLIST

## HOW TO NOT GO OVER BUDGET OR MISS DEADLINES

A Practical Guide to Delivering Automation Projects Successfully  
Plan better. Manage risks. Deliver on time and on budget.



### 1 DEFINE PROJECT OBJECTIVES CLEARLY

Many automation projects start with vague goals and incomplete requirements.

- Project scope is documented
- Success criteria are defined
- Operational requirements are agreed
- Stakeholders are aligned
- Risks have been identified
- Budget expectations are realistic

**⚠️ Unclear objectives create project risk from day one.**



### 2 IDENTIFY HIDDEN COMPLEXITIES EARLY

Unexpected technical challenges are a common cause of delays and cost overruns.

- Existing PLC systems
- SCADA and HMI platforms
- Communication networks
- Third-party equipment
- Legacy hardware dependencies
- Documentation quality

**⚠️ Unknowns become expensive during implementation.**



### 3 REVIEW SYSTEM DOCUMENTATION

Poor documentation often creates:

- Additional engineering hours
- Site delays
- Troubleshooting issues
- Rework

- Electrical drawings are current
- PLC backups are available
- Network architecture is documented
- Panel schedules are accurate
- System modifications are recorded

**✓ Good documentation reduces uncertainty.**



### 4 ESTABLISH A REALISTIC PROJECT PLAN

Project plans should include:

- Design phase
- Software development
- Panel manufacture
- Factory testing
- Site installation
- Commissioning
- Contingency allowances
- Resource availability

**⚠️ Aggressive timelines often create avoidable delays.**



### 5 CONTROL PROJECT CHANGES

Scope creep is one of the biggest causes of budget overruns.

- Assess cost impact
- Assess schedule impact
- Review technical implications
- Obtain stakeholder approval
- Update project documentation

**✓ Uncontrolled changes create uncontrolled costs.**



### 6 REDUCE COMMISSIONING RISKS

Many projects fall behind during installation and commissioning.

- Testing plans are complete
- FAT has been performed
- Backup strategies exist
- Downtime windows are agreed
- Resources are available
- Recovery procedures are documented

**⚠️ Preparation reduces commissioning surprises.**



### 7 MAINTAIN COMMUNICATION THROUGHOUT THE PROJECT

Projects often fail due to communication gaps.

- Roles and responsibilities are clear
- Progress is regularly reviewed
- Risks are communicated early
- Decision-makers remain engaged
- Actions are tracked
- Escalation paths are defined

**✓ Communication keeps projects moving forward.**



### PROJECT DELIVERY SCORE

- 40+ CHECKED**  
Excellent, project delivery risks are well controlled.
- 30 - 39 CHECKED**  
Good preparation with minor risk areas.
- 20 - 29 CHECKED**  
Moderate risk of delays or budget overruns.
- BELOW 20 CHECKED**  
High likelihood of project delivery challenges.

### THE BENEFITS

- BETTER BUDGET CONTROL**  
Reduce unexpected costs and project overruns.
- FASTER DELIVERY**  
Minimise delays and disruption.
- LOWER PROJECT RISK**  
Identify challenges before they impact delivery.
- IMPROVED STAKEHOLDER CONFIDENCE**  
Keep teams aligned and informed.
- SMOOTHER COMMISSIONING**  
Reduce site issues and project stress.

### HOW STRATOS HELPS

Stratos Control Systems helps manufacturers deliver automation projects successfully through structured planning, risk management, modernisation expertise and practical engineering support.

Whether you're upgrading PLCs, replacing legacy systems, implementing SCADA or modernising production infrastructure, we help reduce risk and improve project outcomes.

