

Liftoff

Setting your initiative up for success

Initiative overload is an epidemic.

Initiatives and special projects abound for good reason: they can be essential for advancing organization priorities and capabilities. But done poorly, as they so often are, they consume more value than they create, fizzling before they produce lasting results.

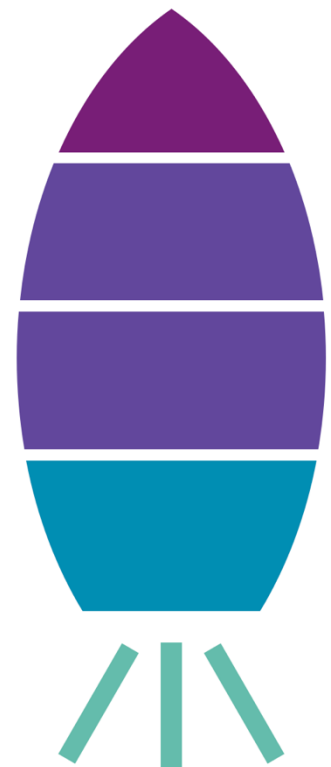
Like so many things that waste the time and energy of knowledge workers and their organizations, initiative overload doesn't have to be "just how it is." Instead, with the right planning at the start, you can almost ensure that your next special project sustains liftoff. The trick is going slow to go fast – and in this paper, we'll tell you how.

There are three key steps to successfully launching an initiative:

Step 1 – Confirm that the problem statement merits an initiative

Step 2 – Assemble the right skills and capabilities on the team

Step 3 – Build an initiative charter to define success and clarify assumptions



Step #1:

Confirm that the problem statement merits an initiative

Before you jump headfirst into your next new initiative, consider the following [statistic](#): 50 percent of knowledge workers have worked on a project and only later found out that another team was working on the same thing. In our experience, it's equally likely that a solution to your challenge exists somewhere else within your organization, just waiting to be adapted to meet your specific needs. The fact of the matter is that there are only so many problems to be solved, and only so many ways to solve them.

Start by clearly defining your problem statement – the specific challenge that needs to be solved – and scope your project around it. Ask yourself the following questions and document the answers:

- Why is this project required? What problem is it trying to solve?
- What are the key outputs, outcomes, and / or deliverables from this work?
- What are the major tasks or activities required to complete the work?
- What working assumptions should serve as the basis for the team's work?
- Who are the key stakeholders in this effort?

Next, ask around. While you still may have work to do, starting from someone else's blueprint is much more efficient than beginning from a blank slate. A project charter, which we'll cover in Step 3, is a good communication vehicle for seeking out related projects.

It's also possible that the challenge can be addressed more efficiently and effectively via a less time- and resource-intensive means. Consider:

- Does the work require cross-functional skills, knowledge, or expertise?
- Is the work of a short duration or of a nature that does not merit a longer-term functional “home”?
- Are the deliverables or outcomes of the work a priority for the organization?
- Will cognitive diversity yield a better outcome?
- Is the problem complex, counter to the current way we do business, or multi-dimensional?
- Is speed a key success factor?

If the answer to more than one of these questions is “no,” consider another way to get the work done, such as making it a functional accountability or a special assignment for a subject-matter expert.

Step #2:

Assemble a high-performing initiative team

Assuming all systems are still a go, it's time to assemble your initiative team. Start by identifying the specific roles you need to accomplish your objectives, and the skills and experience those roles require. Resist the temptation to simply default to your top performers, or the individuals who have the most capacity.

Also, be judicious: Make sure each person on the project team directly contributes to the work. Stakeholders who need to be consulted or kept informed are important, but they are not part of the team. The initiative team should be large enough that all the necessary capabilities are covered and workloads are manageable, but still small and agile enough to keep the work moving forward.

Next, intentionally set and document team roles. Effective collaboration relies on clearly defined roles and responsibilities. However, many leaders and teams often assign roles based on past experiences without considering the current context. By taking the time to define and align on roles from the outset, you can prevent duplication of effort, enhance collaboration, drive accountability, and enable effective decision-making. While the number of roles may vary based on the specific nature and requirements of the project, we recommend the following structure:

ROLE	RESPONSIBILITIES
Project sponsor(s)	<ul style="list-style-type: none"> ▪ Ratify all major decisions ▪ Keep key stakeholders informed of all decisions
Project leader	<ul style="list-style-type: none"> ▪ Design the work and lead the team ▪ Liaise between project sponsor and project team ▪ Provide feedback and coaching to all project team members ▪ Manage expectations and provide guidance to the team as needed ▪ Sign off on decisions and deliverables to be presented to sponsor
Project team members	<ul style="list-style-type: none"> ▪ Engage in all project meetings and contribute ideas ▪ Develop deliverables ▪ Provide subject-matter expertise ▪ Regularly update project leader on task progress, potential risks, and any support needed
Project manager	<ul style="list-style-type: none"> ▪ Establish collaborative norms at the outset ▪ Manage overall project timeline and deliverables ▪ Oversee communication and scheduling ▪ Flag when milestone dates are at risk

It's worth noting that the roles of project sponsor, project leader, and project manager are often confused and conflated. In this context, the project leader is the individual doing the work outlined in this paper – assembling the team, drafting the charter, etc. The project sponsor, depending on level of seniority, could be your manager, the director of your function, or a member of the executive team. Their role is to ratify the assumptions and approach to the initiative, as well as the big decisions made over its course. Liaising between them and the project team, and keeping them apprised of initiative progress and roadblocks, is a critical role of the project leader. Finally, the project manager keeps the initiative motor humming effectively and efficiently. They'll set milestones and timelines, create a workplan, and assign / track team member tasks.

Step #3:

Build an initiative charter to guide the work and define success

An initiative charter – a document that clearly outlines the objectives, scope, milestones, and team – is critical to a solid launch and keeping the project on track. It gets to a level of detail that is sometimes overlooked at a project's outset, and it saves time and frustration in the long run.

Before you officially launch the initiative with your team, start your charter by documenting the following:

- Project purpose
- Desired outcome
- Importance / level of priority
- Project objectives

Share your initial thinking with the project team in advance of the kick-off so they are oriented at the outset. You'll then use the time together to refine these items and build out the rest of the charter.

Tackle these charter elements together as a team:

- Success measures
- Key scope assumptions and interdependencies with other organization initiatives
- Major milestones
- Specific responsibilities of individual project team members

It's important to note that creating a charter is not a "set it and forget it" exercise. Instead, the charter should be treated as a living document, accessible to all team members and frequently leveraged and updated by the project leader and project manager. When circumstances change over the course of the initiative, or new information emerges, having a single source of truth to rely on can serve to reorient the team and guide decision-making.

In our current climate, no one has the time to waste on a string of failed initiatives. But as frustrating as initiative overwhelm is, most special projects are spurred by real problems and good intentions. Spend the time to set your initiative up for success at the outset, and you'll be rewarded with a mission accomplished.

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