

Have the argument at the beginning

So the project lands on your desk.

You start to think about how to get it going, how to get the project off to the best possible start. The project charter, or initiation document, is your first priority, perhaps a kick-off meeting as well.

It doesn't often seem it, but this is a critical moment in the project – maybe the most critical part. Why doesn't it seem it? Well it can seem as though the initiation process is something we do before the 'proper' work of the project, a routine we have to go through.

But what we do early on in the project has a huge effect further down the line. Without realising it we can fundamentally shape the future direction of the project in those first few moments the project is in our hands. To put it simply, if we fail to get the project off to a good start the chance is lost and it often takes a monumental effort to get a poorly started project back onto the rails.

Of course this is why every project management methodology has a well defined phase to do with starting projects. For the PMI this is initiation and in the PMBoK there are extensive guidelines as to how you might organise this stage of the project.

The PMBoK lists the components that a project manager could use to create a project charter, the key output of this phase. The list invokes a tool kit that every project manager is familiar with – objectives, scope, deliverables, constraints etc. It gives us a mechanism for agreeing the important points of a project before we dive into the more detailed planning and execution phases.

The key point is 'agreeing'. To get agreement on the outline of the project we have to show the charter to the right people. This means the real purpose of the charter is communication. We need to communicate the basis of the project with the sponsor (see white paper 1 on this website!), with stakeholders and with the project team.

It is this idea of communication that makes the charter the most versatile tool of project management, and introduces my unofficial rule of project management: have the argument at the beginning!

In my experience there are two truths in every project. One, every project has a cheap end and an expensive end. The cheap end is at the beginning, the initiation phase, the expensive end is at the finish when we have completed the work. Two, in every project you're going to have an argument! It could be with the sponsor or project team or maybe the end user or customer or any other key stakeholder but you'll have an argument.

Put these things together and the importance of the charter becomes clear - it enables you to have the argument at the beginning, at the cheap end of the project. It doesn't matter if we have the

argument here, it doesn't cost us anything as no work has been done on the project. If we have the argument in the middle, or worse at the end of a project, it's too late, we've committed time and money to the project.

I think a well thought out charter should be designed to do just this. It should provoke an argument. It should drive any contentious issues to the front where we can sort them out early in the project.

This will create some extra work for the project manager. There will be a lot of back and forth arguments, there may well be many different iterations of the charter. It will be aggravating and frustrating at times but it's worth it. Have the argument now, at the cheap end, not later when it gets expensive.

For a large project this can be done phase by phase, in the classic use of a charter. For every commercial project I run, at the start of each phase the client and I have a good old ding-dong. We use a phase start charter as the medium for discussion on the project. Both they and I appreciate this process.

But the charter can be much more versatile than this.

A few years ago I was running a complex, 18 month software development project. The schedule was tight. I was running it using the principles of rolling wave planning. The end milestone of each phase was an invoicing point, and it was critical from a commercial point of view that deadlines were hit.

We desperately needed more staff, but with a tight budget we just couldn't afford the cost. But then we were approached by our local university – would we be prepared to take on a couple of students for their year in industry? They had just the skills we needed, but this is a big step. Introducing two new team members into a team working flat out, and two team members who, although very technically able, had no commercial experience. It could be disastrous.

After some thought we took them on. They had to get involved in fee earning work instantly. We adapted the concept of a charter to get them up and running straight away. For every task they started (sometimes only a one or two day task) we had a template. Not the full PMI charter of course, but a few crucial points. They would be delegated a task, fill in the template and show it to their team leader. They had an argument. After a few tries it would be sorted and they would start work with full confidence they knew what to do.

This whole process for such a small task was just half an hour or so. For that little bit of up-front effort they could go and work independently on critical tasks with complete safety, because they had already had the argument.