

Project Charter Solving Problems Early



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Chartering a project lets a PM surface problems and conflicts early so they can be resolved before the project work starts. We also have to cope with the executive's expectations about the project and how the PM will manage it.

When problems arise at mid-project, the impact is twice as severe as it would have been if we had dealt with them early. The charter is not just paperwork. It a chance to avoid common problems that arise from:

- Inadequate PM authority
- Misunderstandings about what the scope includes and doesn't include
- Unclear change control processes
- Resources that don't show up for project work
- Risks we did nothing to prevent.

The charter presentation lays out the high level scope, risks, constraints and resources. It is the framework for the detailed planning and should be approved before that process commences. Fresh from scope definition and identifying major deliverables, the project manager has the sponsor's and stakeholders' attention. It's the ideal time to talk about what's needed to produce the project deliverables. There is a right way and a wrong way to do the charter and we have to be aware of the executives' expectations, which are often not spoken.

Bad Charter & What People Are Thinking

Let's listen in on a typical session where a project manager talks with an executive about the charter components. We'll not only hear the words they say but we'll also learn what they're really thinking.

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Project Manager's words: "I will need the authority to coordinate the activities of the entire project team and integrate their efforts so we can achieve outstanding results. This authority must cross functional and departmental lines because the project does. I also need your support in securing resources, problem solving and change control processes."

Project Manager's thoughts: I don't want a repeat of that last project where most of the team ignored their assignments unless I spent hours each week begging and pleading with them to get their tasks done. This project's bigger and I'll need executive support when there are problems.

Project Executive's words: "Of course, you have my full support. My door will always be open if you have any problems getting things done. Now, exactly when are we going to finish and what will this cost?"

Project Executive's thoughts: "Geez another project manager who wants to boss everyone around and have everyone in the company on the project team."

Risks and Assumptions

Project Manager's words: "I'm sure you've carefully read pages 46 to 77 of the project charter where I detailed the risks the project faces. These are challenges that we all must work together to resolve."

Project Manager's thoughts: I was up half the night thinking through everything that could possibly go wrong with this project and I think I got them all listed. If any of those things happen, they can't blame me.

Project Executive's words: "That's a very careful assessment of the risks. You certainly seem to have this project plan well thought out. I am in your corner."

Project Executive's thoughts: "Does this yahoo think this long list of excuses means that we won't blame the PM? What a dope. If this project is late, the first thing I will do is end this clown's career.."

Change Control

Project Manager's words: "We need to freeze the project plan that you've approved today because we all realize the devastating effect that changes have on our ability to finish on time and within budget."

Project Manager's thoughts: These executives always want to add new stuff to the project whenever they wish without changing the due date and budget. That has to

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stop. That's why we never finish on time and why no one's ever happy with project results.

Project Executive's words: "Well, there is a need for flexibility but I certainly agree that we want to keep this project on course."

Project Executive's thoughts: "This is my project and I will add whatever I want to the plan and the PM will salute every time I do."

PM Has Not Avoided Problems or Changed Expectations

Now we have a project that is ripe for failure. The executive's expectations are negative about the PM and the management of the project. The project manager's technique let the executive gloss over the problems instead of dealing with them. No one had to make hard-edged commitments. So the issues of the PM's authority, risk management and change control were left to smolder; for now. But those smoldering embers will burst into flames in mid-project, when they will do the most harm.

There is a better way to present a charter but it does not result in everyone leaving the meeting smiling and laughing. Why will they be unhappy? Because we want to surface problem issues now about borrowing people across functional lines, risks and making changes before we start work. Let's see how it's done.

Project Manager Authority & Resource Specifics

If we're going to have problems getting resources when we need them, then we make an explicit request rather than asking for support, which means nothing now. It's best to find out before we start work about issues with making assignments across departmental boundaries. . So we communicate PM authority in our charter with words like:

Project Manager's words: "This project requires approximately two hours a day from each of the following first-line supervisors during the month of June (List of specific names and titles). As project manager, I will "own" those two hours every day and be able to directly assign work from the approved project plan and schedule to those people during that two-hour period."

Are those words likely to inflame any issues that exist about cross-functional or matrix authority? Yes they are and that's the point. By being very direct and crystal clear about the resources and the kind of authority we need to get the project done, we inflame the issues early, giving ourselves the

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opportunity to resolve them. Now is the time when we can link the resource issues to the budget and completion date, which are at the forefront of the executives' minds. We can present the benefits and efficiency of these requirements as well as describe the delays and postponements that will result if we don't get them.

Project Risks & Assumptions

We also throw gasoline on project risks by being equally direct about them. Identifying every possible risk and assumption does not insulate the project manager from blame. The fact that a PM listed 157 bad things that might happen has never in the history of project management protected a PM from being blamed for a failed project.

Rather than list everything we can think of and have no one read it, we identify 2-4 significant risks that will cause the project to fail. We present these risks with an estimate of likelihood and magnitude of the impact. Then we offer at least one risk response for each. Next we engage the executives in a discussion of the ways to mitigate them including specific things they can do. The executives can then make a decision about what risks they want to run and what risks they want to try and mitigate. As an example, we might identify a few risks like the following:

Project Manager's words: "Ace Consulting has a long-term contract for engineering services based on charging hourly rates on a time and materials basis. They have many friends in the organization and a history of budget overruns and late finishes on 16 of the 18 projects on which we have used them. Delays could cripple this project and cause us to finish months later than planned. I would like the authority to issue a competitive bid on these services."

Once again, the direct approach may seem a little pushy but it's usually preferable to suffering problems with this "politically connected" vendor after they cause delays in the project.

Change Control Rules & Process

The last fire we want to inflame is change control. Project managers who leave change control as an informal, casual process rarely have consistent success. They and their team members are routinely caught between wanting a satisfied client/user and containing the scope of the project.

The cure is very precise rules about who can approve what kind of changes to the project plan. We might ask for project manager change control authority like this:

Project Manager's words: "I recommend a rule that

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no change of budget or schedule or deliverable can be made without a project manager analysis of the impact on scope, cost, schedule, risk, quality and resources. Changes must be approved by an accountable executive.

By being direct, we can solve potential problems early.

Summary

To learn more about implementing these charter elements, consider our 1-to-1 personal online training where you set the [schedule](#).

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