For any project to deliver successfully, it must be set up carefully; key players identified, timescales and resourcing considered, scope and required benefits defined, objectives agreed.

For an engagement driven project, initiation is even more important. The success of the approach relies on engagement at the earliest opportunity and actions taken at the beginning set the tone for the whole project. Regardless of the driver for the improvement – customer dissatisfaction, perception of bureaucracy, operational changes, budget reduction or need to enhance compliance - dialogue begins right at the start. This may present challenges but will contribute to the richness of debate about priorities and what can be achieved. Sponsors, process players or users may have different perspectives of what is important – these have to be taken into account as each is equally valid. Conflicting views need investigating, so that realistic, desirable and achievable outcomes are agreed.

Hints and tips

- Identify and agree who are the key project players; sponsor, process owner and facilitator. Ensure that they understand their roles within the context of this approach.
- Initiate dialogue with all the key players and build your core team.
- Engage with your core team to get their views on project scope, objectives and benefits.
- Maintain momentum by making sure that everyone in the core team knows where the project is heading and what they need to do to get there.
- Keep the project scope realistic but sufficiently challenging that process players and users will be happy to engage and will be able to see a real difference at the end.
- Consider shared leadership or facilitation to combine local knowledge and expertise with change or project management expertise from, for example, a central process improvement team.
- Communicate widely that the project is starting. Use different tools and techniques; this is an opportunity to draw people in, attracting them to the wider team in order to secure their involvement in engagement events and encourage them to put forward their views.
- Identify potential volunteer partners, if possible. They provide an excellent sounding board as the project progresses and provide honest, often insightful comments and thoughts on both the process and how people are engaging with the proposed changes.
- Be mindful of the thoughts and feelings of process players who could be anxious about what they may hear or how they may be affected. Make sure those directly affected and involved are communicated with first and that this directly focuses on the benefits of the approach and the project outcomes.

1 ‘A project is a unique, transient endeavour, undertaken to achieve planned objectives, which could be defined in terms of outputs, outcomes or benefits’

(ref: Association for Project Management).