Planning and controlling an engagement driven project

Planning and controlling an engagement driven project holds particular challenges. Engagement is, by nature, organic, and ongoing, continuous engagement can divert a project from its original course for valid and valuable reasons. Using a structured process improvement model will undoubtedly be useful but it is likely that during the engagement the model may move from a sequential one:

Initiate ➔ Diagnose ➔ Design ➔ Implement ➔ Sustain

to a fluid, iterative one:

Initiate ➔ Diagnose ➔ Design ➔ Implement ➔ Sustain

Hints and tips

- Engage with customers and process players as early as you can during project initiation to get their perspective on scope, objectives and critical success factors.
- Agree scope, objectives and critical success factors with the sponsor and process owner taking account of the views and opinions of others.
- Be open to the possible changes in scope and objectives that may emerge during engagement and where they add value, refer these back to the sponsor for approval.
- Develop an engagement strategy at the outset – involve the sponsor and process owner in identifying process players and customers and working out which engagement practices meet the needs of the project.
- Make engagement the focus of your plan – structure other activities around your engagement events.
- Develop a communications plan that fits with and around your engagement strategy.
- Communicate at every stage so your core and wider team are kept informed of progress.
- Don’t expect the project to run sequentially through the stages or for stages to be ‘signed off’ – engagement will often require you to revisit a stage you thought was complete.
- Don’t constrain engagement activities to one particular stage – solutions will often be designed at the same time as the issue is being diagnosed and may lead to implementation of ‘quick wins’. These could be valuable in demonstrating the success of the approach and maintaining momentum throughout the project.
- Use every engagement opportunity to its best advantage, be open to letting discussion stray into areas you weren’t expecting.
- Don’t let the fluid nature of engagement mean you lose sight of the project objectives or lose control of the project timescales. Remind both the core and wider team what it is you’re setting out to achieve and the time you have available.
- Make sure the project doesn’t lose momentum otherwise the energy and goodwill generated by the engagement could be lost.