

## Great Starts for Consulting Projects

By Mary Kate Scott

**Ensuring a great start on a project is critical for success. These questions are designed to help client and project team members ensure they are set up for success.**

Before each project answer each question and write down the answers. Why write? It

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Confirming what you believe the team should focus on (and not focus) is critical for success.

Use this checklist for the kickoff meeting (consider answering the questions ahead of time, sharing answers and using the kickoff time to discuss the differences in answers).

1. Confirm the goals of the project. Define metrics (reach breakeven point by month X, increase revenue by ...%, save \$... costs, reduce inventory by \$... reduce response times by ...%). In order to do that, it can help to ask a related question: What would be the consequences if the project does fails to deliver on its objectives? Sometimes it's helpful

to ask "why now" for this project? What led to the current situation and what is the ideal situation?

**Confirm the goals of the project... why now? What would be the consequences of NOT doing the project?**

2. What are the project deliverables? Note that deliverables are different from project objectives. If the project objective is to "ensure long term viability for business unit x" then project deliverables could be, for example, a 50 page PowerPoint deck with key recommendations on revenue models (products), a cost structure, a roadmap for the team, a financial forecast, and a set of tools or processes for product managers on how to create brand plans.

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3. What are the outcomes? (Sometimes these are referred to as the criteria for success). How will

you know that the project has succeeded, that the objectives have been met? This is often related to business goals and deliverables. Business goals will usually take time to materialize, so success may often be linked to team commitment to the plan or to testing programs or perhaps pilot results, to allow you to predict a successful outcome.

4. What quick wins that can be identified, in order to get traction and energize the

**Are there quick wins to get traction and energize the team?**

team? These might be cost savings, or decisions that

have been mired in organization politics, or agreement to a marketing campaign or an investment.

5. What is within the scope of the project and, out of scope? This could include very basic demarcation by regions or product lines but it may also include elements that need to be included in a plan or kept out of scope.

6. Who is the main decision maker, with ultimate responsibility for driving the project forward and making it a success? Aim for one person not a committee and it's

rarely the project manager. Who is responsible for other type of decisions affecting the project? This can be several people. Ensure you know the process and timelines for decisions for all decision makers.

7. Who is responsible for ensuring that the team has the right set of resources (time, people, money) for the project? Do they have the authority? This might be the decision maker but it's not always the case.

8. Who is on the team and what is their role, and time commitment? Does each team member know their role and do they agree with it? Be sure to identify reluctant

**Does each team member (including clients) know their role – and do they agree with it? Be sure to identify reluctant or overloaded team members**

or overloaded team members. Do people in the organization know they will be tapped for interviews, data, research or input?

9. What are the links to other projects? Other dependencies?

**What the risks or obstacles that could affect this project?**

10. From the project manager perspective: What are the risks and obstacles that could affect this project? What can be done to minimize those risks and obstacles? From the client perspective, what are the risks and obstacles?

11. What is the timeline and calendar for the project? Set out the activities

and enable the team to view the plan on a physical or electronic “wall”.

12. How will the team communicate across workstreams? Will there be a regular check-in? Will there be an electronic team space for documents? What processes (e.g., version control) need to be agreed to? What technologies would enable better communications, document control, or a better outcome?

Commit to a check-in at the 25% and 65% points on the projects (see next article for details).

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